



HAWAII TOURISM

AUTHORITY

2014 Annual Report
to the Hawai'i Legislature

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Letter from the Hawai'i Tourism Authority

Aloha Kākou,

Ma ka 'ao'ao o ka Hawai'i Tourism Authority (HTA), ke ke'ena ho'omāka'ika'i o ka moku'āina, no mākou ka hau'oli o ka pane'e 'ana aku i mua o nā makamaka i ka Palapala Hō'ike Kūmakahiki o ka HTA no nā hana, lanakila, a me nā ālaina i 'ike 'ia mai Ianuali a hiki i 'Okakopa o ka MH 2014.

I loko o nā makahiki 'elua i hala akula, ua hō'ea ka 'ekonomia ho'omāka'ika'i o Hawai'i nei i nā kāho'e hou o ka hō'ea a ho'olilo kālā na ka po'e malihini i ka 'āina nei. Ma kēia makahiki nō ho'i, ke holo nei nō ka puka ma 'ō aku o ka ulu i 'ike 'ia i kēlā makahiki aku nei, he mea ho'i e wehiwehi hou ai kēia pu'u ola 'ekonomia o kākou o Hawai'i nei. Ma kahi o ke \$40.2 milliona e komo lā pākahi ana, a no laila, ke ki'ei nei kākou i ka 'ohi 'auhau he \$1.58 billiona no ka makahiki ma kēia mua koke aku.

'O ke kau mokulele, ke ala ho'olako nui no ho'i i ka 'oihana ho'omāka'ika'i o Hawai'i nei, nona kekahi puka kūho'e e wānana 'ia nei me ka 11.2 milliona noho mokulele e hō'ea mai ana. Iā mākou e ho'omau nei i ka hana me nā ho'aelike a puni ka honua ma ka ho'onui ala ho'olako malihini, mau pū ka ho'okō i nā palapala ho'olālā hokona e nui a'e ai ka 'ike no Hawai'i nei a pēlā pū me ka 'i'ini e holo mai. He mea kēia e piha koke ai, a e mau ai ho'i ia mau noho mokulele. 'A'ole ma ka halihali malihini wale nō ka waiwai o kēia mau noho mokulele, he ho'oikaika pū i ka 'ao'ao kālepa me ka wehe ala no kākou o Hawai'i nei e puka ai i waho a 'ike aku i ke ao.



Mike McCartney and Aaron J. Salā

I mea e mau ai kēia holomua, ke kia mau nei ka HTA i ka ho'olaulaha i nā 'ano a me nā ala e puka ai kēia mau lanakila. Ke ho'omohala aku nei nō i nā mākeke o nā 'āina 'ē i wānana 'ia e ulu ana a ke 'imi nei nō e laha nā pōmaika'i 'ekonomia ma ka pae'āina holo'oko'a.

'A'ole na ka ho'okahi kēia lanakila, akā, na ka 134,000 po'e kākana a pau e hana nei ma ka 'oihana ho'omāka'ika'i a kākou. Na ia po'e ka puka 'ana i nā kūho'e i kēia mau makahiki iho nei. No ka po'e a pau o ka 'oihana ka hanohano a me ka mahalo pumehana 'ia no ka ho'oholomua 'ana i ka 'ekonomia ho'omāka'ika'i o ka 'āina nei i kēia ki'eki'ena hou a'e o ka lanakila.

Na mākou me ke aloha a me ka mahalo,

Aaron J. Salā
HTA Board Chair

Mike McCartney
HTA President and CEO

Aloha Kākou,

On behalf of the Hawai'i Tourism Authority (HTA), the state's tourism agency, we are pleased to present you with the HTA's Annual Report that covers activities, accomplishments and challenges from January through October of 2014.

Over the past two years, Hawai'i's tourism economy has reached record-breaking visitor spending and arrivals for the state. This year, we are on track to exceed last year's growth, highlighting another landmark year for one of the state's top economic drivers. With an average \$40.2 million infused into the state every day, we anticipate that the state tax revenue for the year will reach \$1.58 billion.

Airlift to the Hawaiian Islands is the lifeline for our tourism industry, and this year we are also projected to secure a record 11.2 million air seats to the state. As we continue to work with our global marketing contractors to increase access, we are also rolling out strategic marketing plans to increase destination awareness and

travel demand to support and sustain these air seats. Not only do these flights bring visitors to the destination, they also stimulate commerce and provide residents with opportunities to see the world.

To sustain this momentum, the HTA continues to focus on diversifying Hawai'i's tourism profile by developing international markets with growth potential, and distributing economic benefits across all Hawaiian Islands.

Without the hard work of the 134,000 individuals who make up our visitor industry, Hawai'i's tourism economy would not have been able to achieve the milestones of success over the last few years. Everyone in this industry deserves credit and a warm mahalo for driving Hawai'i's tourism economy to new heights.

Aloha and Mahalo,

Aaron J. Salā
HTA Board Chair

Mike McCartney
HTA President and CEO

Board of Directors *(As of October 2014)*

<i>Members</i>	<i>Representation</i>
Aaron J. Salā, Chair Assistant Professor, Hawaiian Music and Ethnomusicology University of Hawai'i at Mānoa	At-large
Craig G. Nakamura, Vice Chair Partner Carlsmith Ball LLP	Maui County
Lorrie Stone, Vice Chair Attorney At Law Lorrie Lee Stone, Attorney At Law, LLC	At-large
<hr/>	
Fred Atkins Managing Partner Kaua'i Kilohana Partners	Kaua'i County
Jack Corteway President (Retired) Royal Aloha Vacation Club	At-large
Sean R. Dee EVP, Chief Marketing Officer Outrigger Enterprises Group	At-large
Donna Domingo President ILWU Local 142	At-large
L. Richard Fried, Jr. Founding Member Cronin, Fried, Sekiya, Kekina & Fairbanks, Attorneys At Law	City & County of Honolulu
David Rae Senior Vice President Kapolei Properties, LLC	At-large
Denise Hayashi Yamaguchi President & CEO Denise Hayashi Consulting, LLC	At-large
Kelvin M. Bloom <i>(term end 6/30/14)</i> President Aston Hotels and Resorts, LLC	At-large
<hr/>	
Patricia A. Ewing <i>(Vice Chair, term ended 6/30/14)</i> President E. Wing, Ltd.	Kaua'i County
Patrick K. Fitzgerald <i>(term ended 6/30/14)</i> CEO Hualālai Investors, LLC Kona Village Investors, LLC	Hawai'i County
Robert Herkes <i>(term ended 8/21/14)</i>	Hawai'i County
Victor T. Kimura <i>(term ended 6/30/14)</i> Director of Operations Support Kyo-ya Management Company, Ltd.	At-large
Michael K. Kobayashi <i>(term ended 6/30/14)</i> President, Polynesian Hospitality Kobayashi Travel Service, Ltd.	At-large
Ronald K. Williams <i>(Chair, term ended 6/30/14)</i> President & CEO Atlantis Adventures, LLC	At-large
Randolph Perreira <i>(term ended 8/11/14)</i> President & CEO International Longshore and Warehouse Union	At-large

The HTA held its meetings once a month in 2014 and is scheduled to hold monthly meetings in 2015.



Board of Directors (L-R): David Rae, L. Richard Fried, Denise Hayashi Yamaguchi, Aaron Salā, Donna Domingo, Jack Corteway and Sean Dee (not pictured: Craig Nakamura and Lorrie Stone)

Staff *(As of October 2014)*

Mike McCartney	President and Chief Executive Officer
David Uchiyama	Vice President, Brand Management
Doug Murdock	Vice President, Administrative and Fiscal Affairs
Brian Lynx	Vice President, Meetings, Conventions & Incentives
Caroline Anderson	Tourism Brand Manager
Lynn Bautista	Contracts and Administrative Manager
Maile Carvalho	Accounting Assistant
Jennifer Chun	Tourism Research Manager
Minh-Chau Chun	Tourism Research Manager
Danette Cordeiro	Administrative Assistant
Jadie Goo	Tourism Brand Manager
Laci Goshi	Tourism Brand Manager
Irene Iha	Fiscal Administrative Assistant
Denise Kahalekulu	Administrative Assistant
Grace Lee	Tourism Brand Manager
Dawn Lino	Administrative Assistant
Lawrence Liu	Tourism Research Statistician
Chika Miyauchi	Administrative Assistant
Stella Montero	Budget/Fiscal Officer
Daniel Nāho'opi'i	Director of Tourism Research
Roann Rakta	Executive Assistant
Angela Rodriguez	Director of Communications
Ronald Rodriguez	Contract Specialist
Michele Shiowaki	Administrative Assistant
Michael Story	Sports and Brand Manager
Vengie Talaro	Administrative Assistant
Marc Togashi	Fiscal Manager
Miki Wakai	Tourism Brand Manager
Keli'iholani Wilson	Director of Hawaiian Cultural Affairs

Overview of the Hawai'i Tourism Authority

In 1998, the Hawai'i Tourism Authority (HTA) was established through a legislative act as the lead state agency for Hawai'i's visitor industry. This same act also established the Tourism Special Fund – a set percentage of the transient accommodations tax (TAT) collections that is assessed on hotels, vacation rentals and other accommodations to be used by the HTA to market, develop and support Hawai'i's tourism economy. Among its responsibilities, the HTA is charged with:

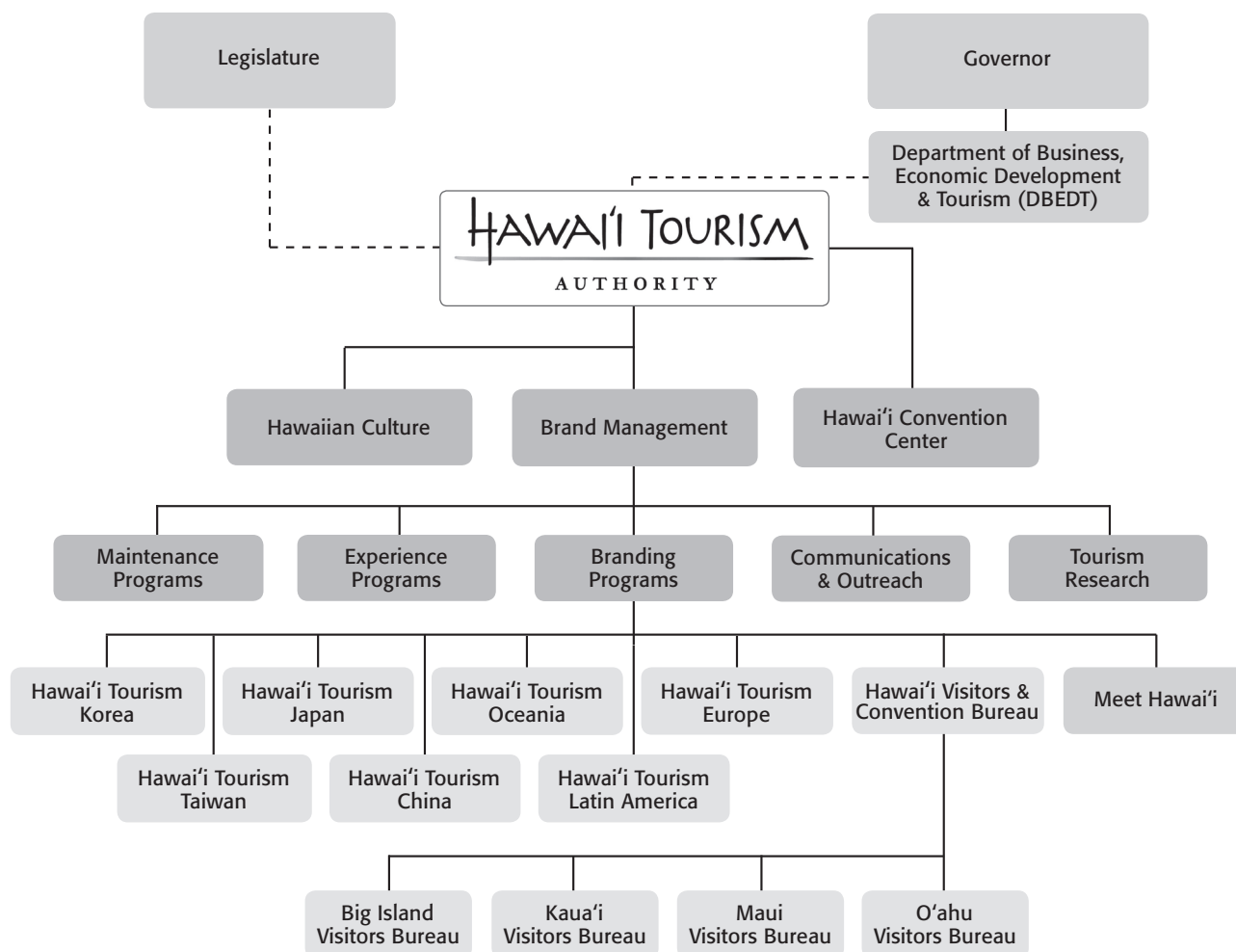
- Setting tourism policy and direction from a statewide perspective;
- Developing and implementing the state's tourism marketing plan and efforts;
- Managing programs and activities to sustain a healthy visitor industry for the state;
- Developing and monitoring implementation of the Hawai'i Tourism Strategic Plan: 2005-2015 (State TSP);
- Coordinating tourism-related research, planning, promotional and outreach activities with the public and private sectors;
- Perpetuating the Hawaiian culture;
- Distributing visitors across all of the Hawaiian Islands to balance capacity; and
- Creating greater collaboration with other state agencies.

Operations

The HTA is administratively attached to the State Department of Business, Economic Development & Tourism (DBEDT). The HTA's president and chief executive officer reports directly to the HTA board

of directors and is responsible for assisting the board in its responsibility to execute the mandates of Chapter 201B of the Hawai'i Revised Statutes.

HTA Organizational Structure



Annual Work Cycle

The HTA's continuously evolving work cycle begins with the gathering of research and market intelligence. This information is used to help formulate the direction of the HTA within each of the major market areas, while balancing the needs of the Hawaiian Islands to optimize the industry's contributions to Hawai'i's communities, both culturally and economically, across the state.

1. Research

Research is the foundational source that helps the HTA formulate its plans for the sustainability of Hawai'i's tourism industry. The HTA utilizes market intelligence, historical and current visitor data that takes into account changes in seasonal trends, demographics and economic conditions.

2. Tourism Strategic Plan (TSP)

The state TSP offers a long-term vision for tourism, which helps in the development of a vision and goals for the HTA Strategic Plan.

3. HTA Strategic Plan

The HTA's Strategic Plan serves as a road map to address short-term goals to achieve Key Performance Indicators (KPI), based on research data, stakeholder meetings, partner collaboration and market intelligence.

4. Targets

KPIs (i.e., arrivals, per person per day spending, etc.) are used to measure the success of initiatives by the HTA and its marketing contractors.

5. Brand Management Plan and Budget

The Brand Management Plan formulates initiatives that will help to achieve the HTA's KPIs. Budget plans are then formulated to support the Brand Management Plan.

6. Execution

The HTA's global marketing contractors will then develop their annual brand management plans to supplement the HTA's Brand Management Plan, based on their respective market's current trends and conditions.

7. Evaluation #1

From monitoring research data, drawing from market intelligence and reviewing its global marketing contractor initiatives during the Spring Marketing Update, the HTA will reassess its KPIs in an effort to optimize performance outcomes.

8. Adjustments

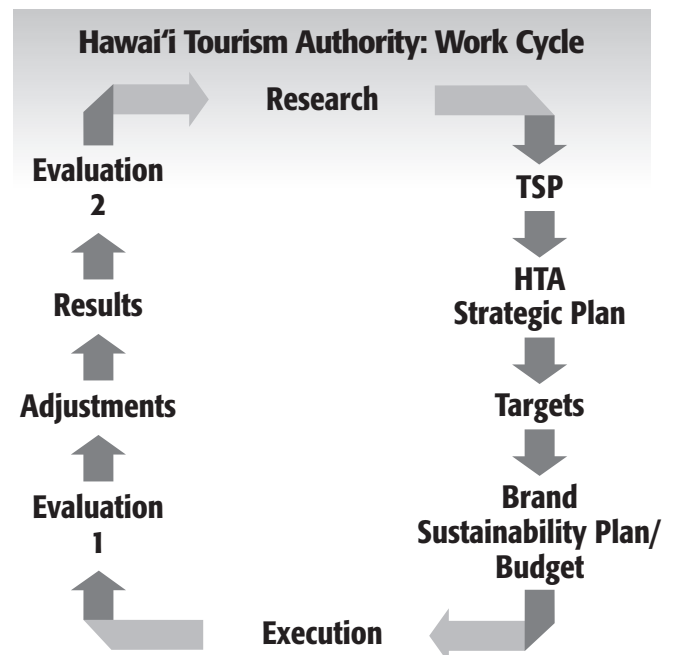
The first evaluation provides an opportunity for the HTA and its marketing contractors to regroup and review current market trends and economic conditions and make necessary adjustments to its marketing plans in order to obtain its objectives.

9. Results

During the third quarter the HTA continues to monitor year-to-date results, analyze economic conditions and trends, and compare them against KPIs in order to plan for the next year.

10. Evaluation #2

Toward the end of the year, the HTA will evaluate the effectiveness of its initiatives and weigh market research and intelligence to consider which initiatives to refine, retool and implement in the next year.



Hawai'i Tourism Authority Strategic Plan: Summary and Progress

The goal of the HTA Strategic Plan is to optimize benefits for Hawai'i and integrate the interests of visitors, the community and visitor industry. Below are the HTA's objectives strategies, and performance indicators for 2014. This provides an overview of the HTA's Brand Management Plan, goals and progress.

Objectives:

- To achieve or exceed visitor spending targets;
- To achieve or exceed per person per day (PPPD) spending targets;
- To achieve or exceed air seat targets with managed distribution to all islands;
- To improve and optimize Hawai'i's cruise ship industry to contribute to sustainable growth in Hawai'i's tourism economy;
- To improve the quality of the Hawai'i experience;
- To contribute to a better quality of life for Hawai'i residents; and
- To operate efficiently as the state's tourism agency and maximize the return on investment (ROI) of state tax collections.

Strategies:

- Implement marketing programs across diverse major market areas to stimulate short-term visitor arrivals and expenditures;
- Utilize an integrated brand management approach to efficiently drive demand and deliver a unique and satisfying Hawai'i experience for both visitors and residents;
- Ensure the availability of air seats and continue to build sustainable cruise ship access to Hawai'i;
- Elevate Meetings, Conventions and Incentives (MCI) efforts, with increased emphasis on international markets; and
- Actualize and demonstrate the HTA's transformation into a more knowledge-based and efficient state tourism agency, which maximizes the return on investment of state tax collections.

Performance Indicators:

Economic Indicators

- Number of jobs
- Unemployment rate
- Tax revenue
- TAT collections
- Visitor spending

Experience Indicators

- Visitor satisfaction
- Consumer sentiment expressed in online and social media

Quality of Life Indicators

- Resident sentiment of tourism

Performance Indicators

- Return on Investment
 - Cost per arrival from each market
 - Marketing dollar to expenditure from each market

Native Hawaiian Culture Investment and Progress Indicators

- Development of new host culture based events and programs
- Increased use and incorporation of Native Hawaiian language

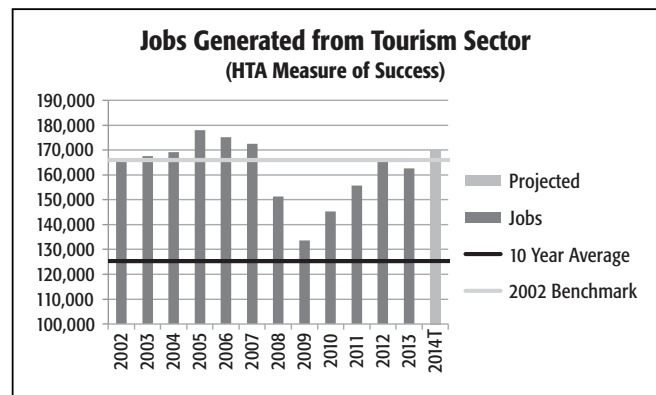
* The subsequent two pages (pages 6 and 7) include the results and effectiveness measures as it relates to each indicator.

HTA Measures of Effectiveness

Economic Indicators

Number of Jobs

In 2013, jobs fell short of the 2002 benchmark, but are projected to increase in 2014.

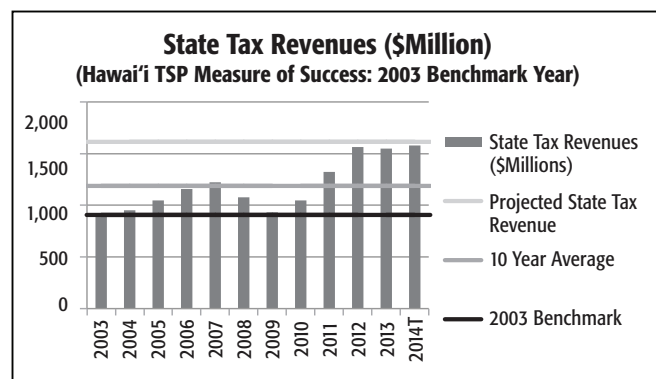


Unemployment Rate: % of people in the civilian labor force

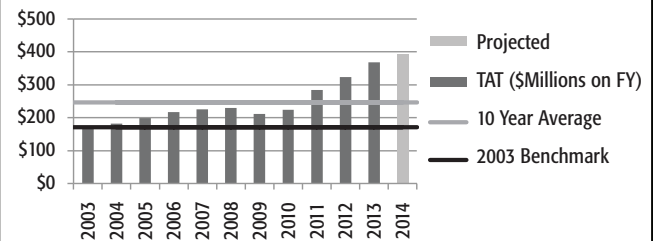
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012p	+/- Benchmark
United States	5.8%	6.0%	5.5%	5.1%	4.6%	4.6%	5.8%	9.3%	9.6%	8.9%	8.1%	2.1
State of Hawai'i	4.0%	3.9%	3.2%	2.8%	2.5%	2.7%	4.1%	6.9%	6.9%	6.7%	6.0%	2.1
C&C of Honolulu	3.9%	3.7%	3.1%	2.7%	2.4%	2.5%	3.7%	5.8%	5.8%	5.7%	5.3%	1.6
Hawai'i County	4.6%	4.6%	3.9%	3.3%	3.0%	3.4%	5.7%	9.9%	10.0%	9.9%	8.5%	3.9
Kaua'i County	4.4%	4.0%	3.4%	2.7%	2.4%	2.6%	4.6%	9.4%	9.0%	8.8%	7.4%	3.4
Maui County	3.9%	3.7%	3.1%	2.6%	2.4%	2.8%	4.6%	8.8%	8.6%	7.9%	6.4%	2.7

Tax Revenue

Tax revenue generated by tourism provides a benchmark for the overall economic health of the visitor industry and also provides funding for the HTA, county and statewide programs that support tourism in Hawai'i. Total tax from the visitor industry are comprised of the Transient Accommodations Tax, the portion of the General Excise Tax related to tourism, concessions and other visitor industry receipts, and government fees and assessments. State tax revenue generated by visitor spending serves as a representation of tax collected and other visitor industry receipts.

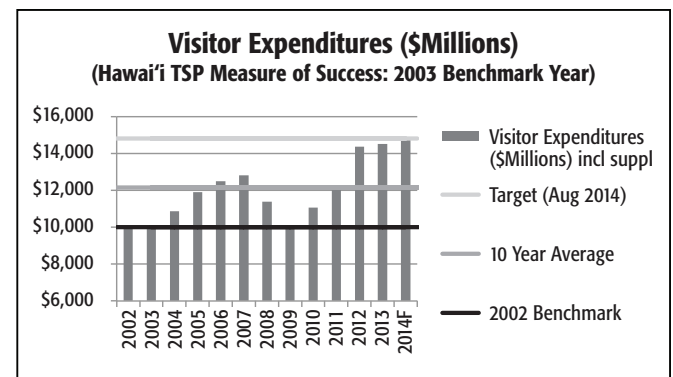


Transient Accommodation Tax by FY (\$Millions) (HTA Measure of Success)



Visitor Spending

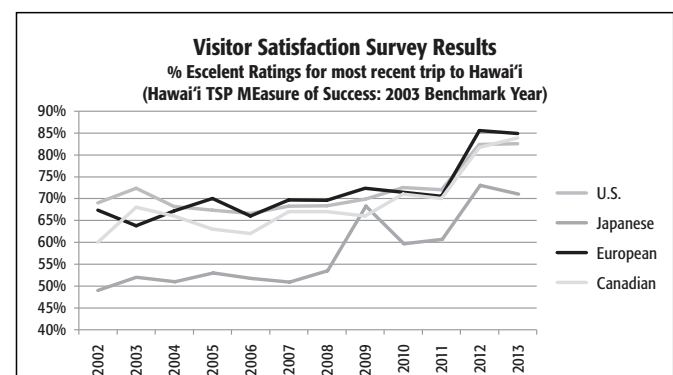
Overall, total visitor spending (nominal) in the state grew 1.2 percent from 2012 to 2013. Visitor spending met or exceeded the 2003 benchmark nine out of the 10 previous years (see Figure 1) and grew 44.4 percent since 2003. However, when visitor spending is compared in real dollars (adjusted for inflation), 2013 exceeded the benchmark by only 25.3 percent (see Figure 2).



Experience Indicators

Visitor Satisfaction

2013 statistics showed that visitors continued to give high marks for their overall experience in Hawai'i and the majority of visitors rated their most recent trip as excellent. For 2013, all markets have shown a higher level of satisfaction over the benchmark year of 2003.

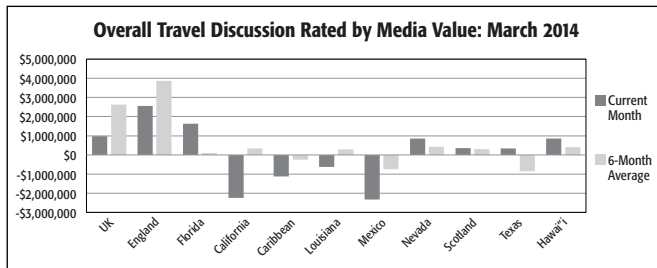


*Survey on Europe and Oceania was not done in 2010

Consumer sentiment expressed in online and social media

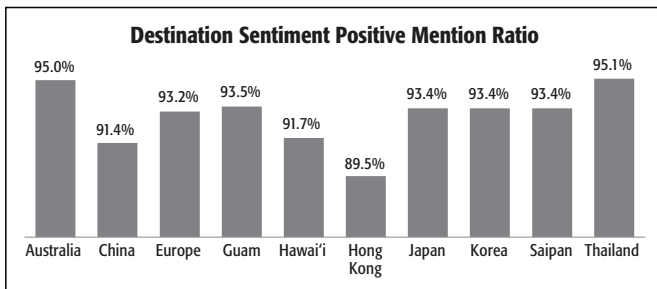
These measures serve to illustrate the level of customer presence and corporate engagement that currently exists in the Hawaiian Islands brand. All data was aggregated from online content including keyword mentions, site segmentation, sentiment analysis and buzz volume.

North American's Overall Travel Discussion Online



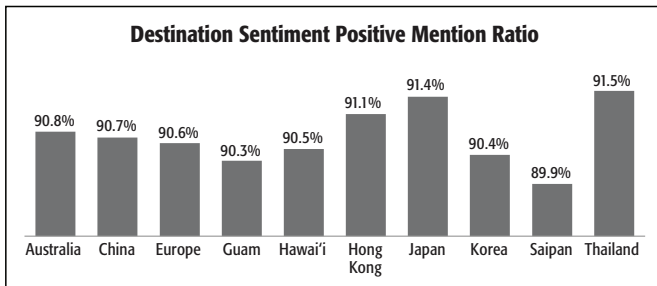
Source: HTA General Sentiment Report, April 11, 2014 (through March 2014)

Destination Sentiment: China



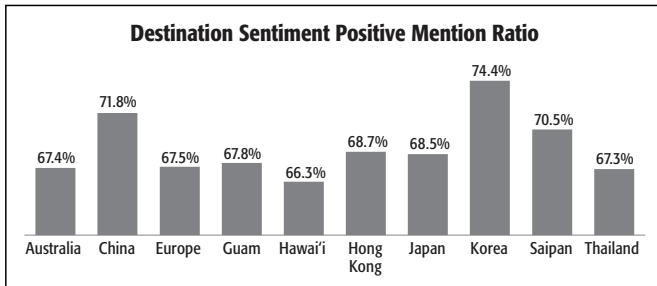
Source: HTA Social Intelligence Report: Hawai'i on the Asian Web, October 2014

Destination Sentiment: Taiwan



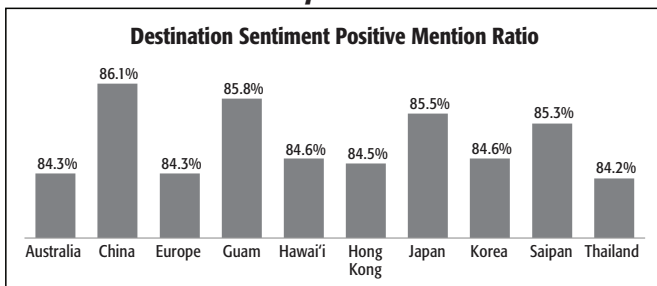
Source: HTA Social Intelligence Report: Hawai'i on the Asian Web, October 2014

Destination Sentiment: Korea



Source: HTA Social Intelligence Report: Hawai'i on the Asian Web, October 2014

Destination Sentiment: Japan



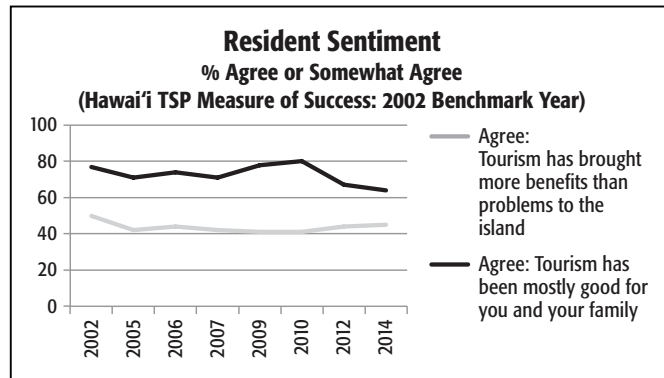
Source: HTA Social Intelligence Report: Hawai'i on the Asian Web, October 2014

Quality of Life Indicators

Resident Sentiment

"The Survey of Resident Sentiments on Tourism in Hawai'i" is a tracking survey that uses a statistically valid sample of Hawai'i residents to determine attitudes about tourism. A key question from the survey is, "Overall, tourism has brought more benefits than problems to this island; agree or disagree." The TSP identified 2002 as the benchmark year. Results in years 2009 and 2010 exceeded the 2002 rating; however, 2012 and 2014 ratings fell short of the benchmark.

Participants were also asked to rate "the overall impact of tourism on you and your family." In 2002, 50 percent of residents indicated mostly positive perceptions of tourism on their families; however, subsequent surveys have all fallen short of the benchmark.



Source: HTA Resident Sentiment Survey conducted by Market Trends Pacific, Inc., John M. Knox & Associates, OminTrak Group, and QMark Research.

Performance Indicators

Return on Investment - Fiscal (Efficiency)

Total Visitor Spending to Marketing Dollars

	2007	2008	2009	2010	2011	2012	2013
North America	338:1	235:1	207:1	216:1	213:1	311:1	317:1
Japan	223:1	219:1	180:1	252:1	305:1	311:1	326:1
Oceania	270:1	251:1	193:1	283:1	320:1	392:1	621:1
Other Asia	198:1	82:1	75:1	112:1	116:1	245:1	269:1
Europe	240:1	249:1	1066:1	694:1	629:1	571:1	714:1

State Tax Revenue Generated to Marketing Dollars

	2007	2008	2009	2010	2011	2012	2013
North America	30:1	21:1	21:1	24:1	23:1	34:1	34:1
Japan	20:1	19:1	18:1	27:1	33:1	34:1	35:1
Oceania	24:1	22:1	20:1	31:1	35:1	43:1	66:1
Other Asia	18:1	7:1	8:1	12:1	13:1	27:1	29:1
Europe	21:1	22:1	108:1	76:1	69:1	62:1	76:1

Native Hawaiian Culture Investment and Progress Indicators

Note: The HTA is currently identifying meaningful measures and developing appropriate methods for data collection.

Strategic Plan Update

This is the HTA's fourth Strategic Plan since the agency was established in 1998. The previous plan, adopted in 2004, was titled Hawai'i Tourism Strategic Plan 2005-2015. That plan was the first to be organized as a "State" plan that assigned responsibilities for some initiatives to other government agencies and to various private-sector groups.

In reality, the HTA does not have sufficient authority or resources to require others to help carry out a plan, or to constantly monitor and oversee all that might be done by others. Therefore, the new Hawai'i Tourism Authority Strategic Plan (HTASP) is once again an "HTA" plan only, though it recognizes the need to work with partners and stakeholders. This approach is intended to increase the odds the HTASP can be successfully implemented, give clear guidance on priorities, and permit accurate measures of success and progress.

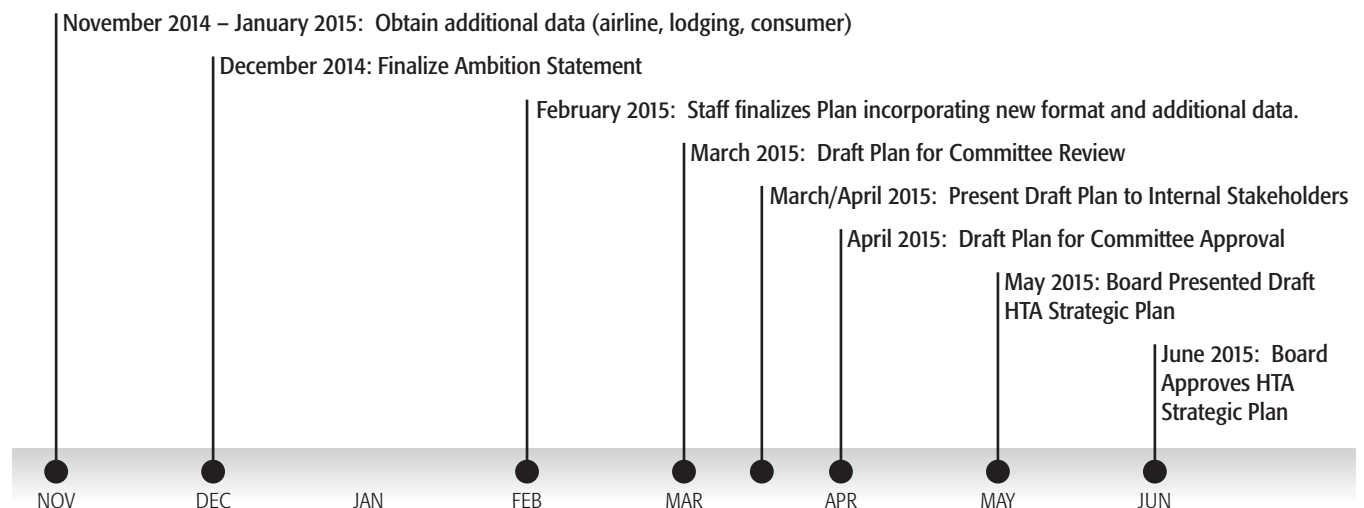
The new HTASP concentrates of four overarching goals, and is a long-range strategic plan as required by HRS 201B-3(b)(4), and will not have a timeframe attached to it. It contains both short- and long-term goals, objectives and strategies that will be reviewed and, if necessary, revised annually by the HTA's board of directors. The planning process began with a review of the older plan's various initiatives, issues and goals – and still incorporates what are judged to be the highest priority concerns from the previous document. However, an assessment was made of changing conditions, and so the HTASP adds some goals and strategies, and de-emphasizes some older ones. Final decisions about content – goals, objectives, strategies and success measures – in this plan came from HTA staff and board members. However, these decisions were based on input that included:

1. Individual (and some small-group) interviews with approximately 60 selected industry, government, and community stakeholders throughout the state, in the spring and summer of 2013.
2. A review of published information about changing conditions in the local, national and international tourism environment, completed in the summer of 2013 (with an early 2014 update), along with a "state of the destination" assessment done at the same time.
3. Six facilitated Strategic Planning Working Group discussions on key topics, held on O'ahu and Maui in the fall of 2013.
4. The Strategic Planning Working Group and HTA staff and Committee reviewed the goals, measures and strategies, and provided input to targets for years one, two and five.

Additionally, the Collective Ambition/Responsibility Statement, which precedes the HTASP, is based on oral and written input from industry and community stakeholders, and was reviewed at the annual Hawai'i Tourism Conference in August 2013.

The purpose of the HTASP is to guide the organization in addressing issues and creating opportunities that will move Hawai'i's visitor industry forward. As stated above, this is HTA's strategic plan, though the HTA intends to accomplish its four goals by working and collaborating with partners and stakeholders. It is the kuleana of the HTA to drive demand to Hawai'i; deliver on the Hawai'i brand promise and experience; and continue to respect the Native Hawaiian culture and mālama Hawai'i and its people.

Figure 6: Resident Sentiment



HTA Brand Management Plan Overview

As the state's lead agency for tourism, one of the HTA's key roles is to communicate what differentiates Hawai'i from other destinations by developing and marketing unique experiences. The HTA offers guidance and support to its contractors, visitor industry and community partners to work together to position Hawai'i as a unique, world-class destination.

The HTA Brand Management Plan serves as a guideline to ensure that the HTA's Guiding Principle and "Renaissance of Aloha" core values are reflected in all short-term marketing activities to benefit the long-term sustainability of Hawai'i's tourism economy.

"Renaissance of Aloha" Initiative Core Values:

- Extending oneself in support of another;
- Giving without being asked – without expectation of reciprocation;
- Sharing so a new experience could be gained for all parties; and
- Caring for more than just yourself.

"Renaissance of Aloha" Five (5) Foundational Pillars:

- Music;
- Surfing;
- Cuisine;
- Language; and
- Dance

The 2014 Brand Management Plan is an extension of the Tourism Strategic Plan: 2005-2015 (TSP) initiatives, and identifies and prioritizes the most pertinent issues for the HTA. It also presents an operational plan that organizes the HTA for success by providing a detailed execution plan for each of its programs.

In 2014, the HTA updated its Brand Management Plan for 2015 by incorporating the following into a single, comprehensive document: 2015 Market Overview, 2015 Strategic Plan, updated performance goals and targets by program, major market area (MMA) fact sheets and MMA Brand Management Plans.



HTA Program Execution

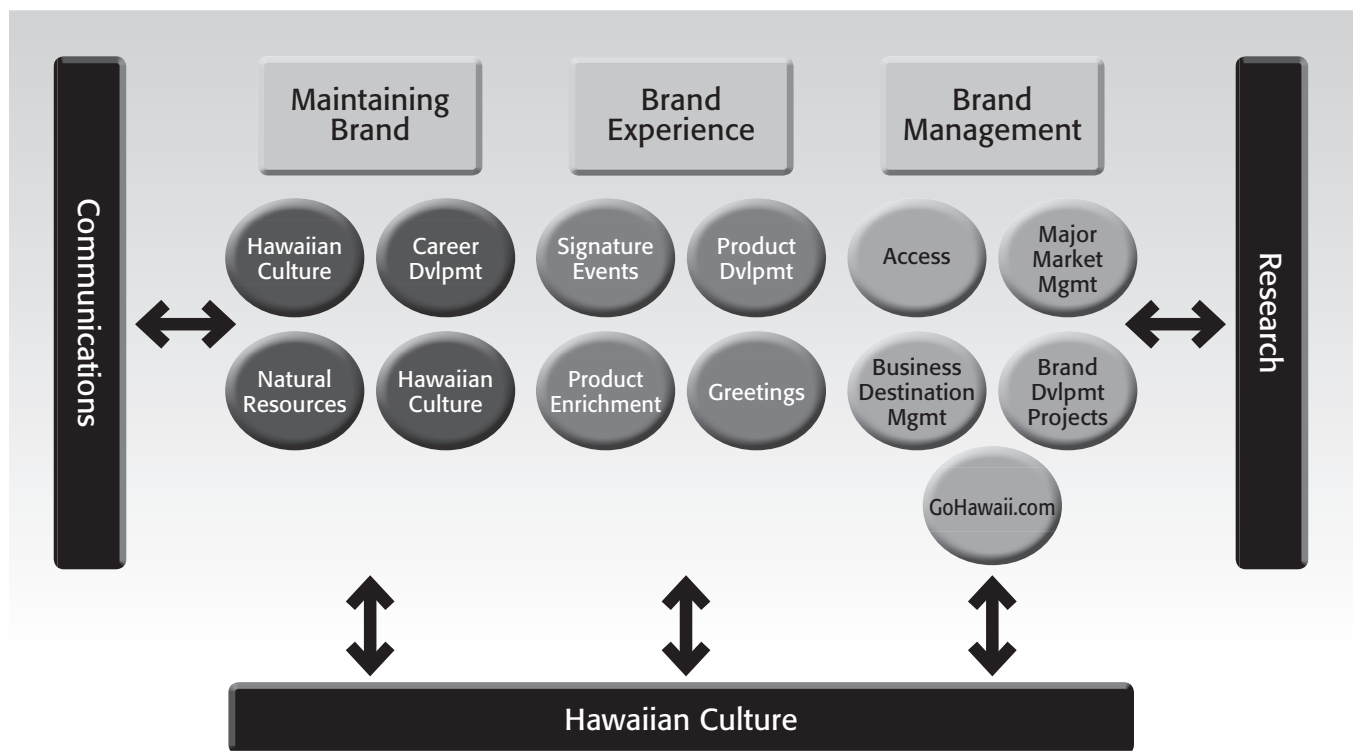
One of the main initiatives under the HTA's Brand Management Plan is developing and supporting programs and events that deliver the destination brand promise. The HTA coordinates with its global contractors, visitor industry partners and community stakeholders to ensure that its marketing and communications authentically promote Hawai'i's unique and distinctive products, including natural resources, Hawaiian culture and multi-cultures.

The HTA's programs are categorized under five core areas:

- **Maintaining Brand:** Programs that address and impact the long-term sustainability of the destination as it relates to the fundamental elements that define Hawai'i's people, place and culture;
- **Brand Experience:** Programs that deliver a unique experience (i.e., festivals and events) that align with Hawai'i's people, place and culture. The HTA creates, develops and/or supports these programs;

- **Brand Management :** Destination marketing and support to attract visitors to the Hawaiian Islands;
- **Communications:** Programs that facilitate interaction among stakeholders, support brand maintenance, brand experience and brand management efforts, and increase awareness for the HTA as a leader of Hawai'i's visitor industry; and
- **Tourism Research:** Programs that provide information to educate and facilitate data-driven decision making for all stakeholders and that support brand maintenance, brand experience and brand management efforts.

*Hawaiian culture is a foundation that permeates throughout all of the HTA's programs and is a value system to guide the HTA.



Maintaining the Brand

Overview

The purpose of the Maintaining Brand area is to support and sustain programs that help to maintain the brand promise into the future. These programs address and impact the long-term sustainability of the destination as it relates to the fundamental elements that define the Hawaiian Islands: people, place and culture.

Programs

Hawaiian Culture

Perpetuates Hawaiian culture for the long-term.

Natural Resources

Protect and preserve Hawai'i's natural environment for the long term.

Career Development

Support academic pathways for Hawai'i's youth with the goal of keeping homegrown talent in the state to provide a more authentic experience for visitors.

Safety and Security

Educate visitors pre- and post-arrival, assist visitors in need, and serve as the lead tourism agency for crisis management.

Hawaiian Culture

The state's Native Hawaiian heritage is unique to the destination and differentiates Hawai'i's people, place and culture from anywhere else in the world. It offers a world view from which the state operates as a destination and is woven throughout all of the HTA's programs and initiatives.

Partnering with the Hawai'i Community Foundation (HCF), the HTA provided 22 Kūkulu Ola: Living Hawaiian Culture grants to community organizations that help to perpetuate the Hawaiian culture. In addition, the HTA supported five (5) Hawaiian Signature Events as the primary sponsor including Aloha Festivals (statewide), King Kamehameha Celebration (statewide), Prince Lot Hula Festival, Prince Kūhiō Celebration and the Merrie Monarch Festival.

The HTA also continued to provide funding to a Native Hawaiian Hospitality Association (NaHHA), the lead agency in Hawaiian culture initiatives as identified in the state's Tourism Strategic Plan (TSP).

A full listing of the projects supported by the HTA can be found on page 48.

Major highlights as evaluated by HTA staff:

- Promoted the HTA's Ma'ema'e Tool Kit to set a standard for HTA contractors and partners to accurately promote the destination as it relates to the Hawaiian culture;
- Created and built on programs that support Hawaiian Music including 'Ahamele Monthly Hawaiian Music Series as well as bringing back a May Day event into Waikīkī;
- Provided support for the World Indigenous Peoples Conference in Hawai'i (WiPCE); and
- Supported the Hōkūle'a Worldwide Voyage.

Making Poi Mobile

The Office of Hawaiian Affairs' nonprofit subsidiary, Hi'ilei Aloha LLC is making poi more accessible and marketable with its Poi Mobile. Using a renovated food truck, the Poi Mobile is a legally certified mobile kitchen that offers local taro farmers an opportunity to process their product into poi and other value-added goods. Leading this initiative is **Lena Racimo**, who is in charge of sales and marketing for the Poi Mobile.

Kalo and poi are an intrinsic part of the Native Hawaiian culture, and the HTA's support of the Poi Mobile initiative through its Kūkulu Ola program allows both residents and visitors a vehicle for gaining a better understanding and appreciation for

Hawai'i's unique culture.

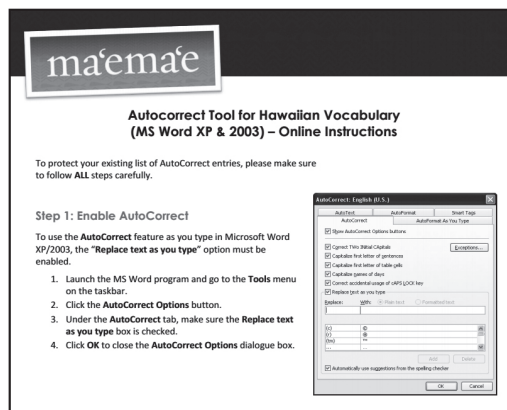
"We found that accessing poi mills or processing taro on a commercial level is one of the obstacles that taro farmers are facing," said Lena. "By supporting local farmers and promoting the 'buy local' effort, the Poi Mobile allows us to help sustain Native Hawaiian cultural practices like growing taro and making poi."

Through the Poi Mobile, Lena and her team also offer poi-making demonstrations and share the mo'olelo (story) and background of taro with Hawaiian organizations and schools in rural communities from Waimanalo through Hale'iwa.

For more information on the Poi Mobile, visit hiilei.org/ *Na-Kumu-Waiwai-Kokua-Nui/ Poi-Mobile*.



Lena Racimo with the Poi Mobile truck



The HTA's online Ma'ema'e Toolkit

Natural Resources

The Hawaiian Islands' natural beauty is one of the primary reasons why visitors choose Hawai'i as a destination, so it is important that the HTA implement programs that respect, enhance and sustain Hawai'i's natural environment. In order to ensure the long-term sustainability of Hawai'i's natural offerings, the HTA works with its partners to off-set the impacts of the visitor industry on the environment.

The HTA also aims to continue to provide Hawai'i's residents with a healthy environment to create a good quality of life for residents and establish opportunities to empower and allow communities to care for the

state's natural environment.

Since 2003, the HTA has provided at least \$1 million annually to support these efforts through the Product Enrichment Program (PEP). The HTA continues to partner with the Hawai'i Community Foundation (HCF) with whom 25 programs were funded under the HTA's Natural Resources Community Program. In addition, nine (9) programs were funded under a Community Restoration Partnership leveraging other funding resources to support environmental programs.

A full listing of projects supported by the HTA can be found on page 48.

Major highlights as evaluated by HTA staff:

- Joined an Environmental Funders Group (EFG) with other funders to discuss collaboration around collective environmental goals to benefit the Hawaiian Islands;
- Engaged with the Community Restoration Partnership (CRP) to leverage multiple pools of funds to support restoration projects around the state; and
- Continued partnership with the Department of Land and Natural Resources (DLNR) to maintain Hawai'i's precious environmental assets.

Sustaining Hawai'i's Coastlines

Visitors to Hawai'i come to enjoy the islands' pristine beaches, exotic marine life, water activities and fresh local cuisine, all of which are dependent on a healthy ocean ecosystem. The HTA understands and values the importance of



preserving the state's ocean environment and in 2014, awarded Sustainable Coastlines Hawai'i with a natural resources grant.

Executive director **Kahi Pacarro** has been an integral part of the nonprofit organization since its formation in 2011, in bringing together other nonprofits, businesses and government agencies to clean up Hawai'i's shores.

"The ability to focus on cooperation versus competition has allowed us to host the biggest cleanups in the state while making strong and lasting relationships with our partners," said Kahi.

This year, Kahi and her team hosted "The Earth Day Mauka

to Makai Cleanup," a mountain-to-the-ocean cleanup that worked on invasive species removal and native plantings. The organization also hosted The Ultimate Sand Sifter Challenge, a unique competition that asked entrants to gather beach microplastics and design an innovative creation.

"In the future, we want to engage the tourism industry in our cleanups. Visitors could have a profound experience at our beach cleanups having a better understanding of Hawai'i's fragile ecosystem," added Kahi.

For more information on Sustainable Coastlines Hawai'i, visit sustainablecoastlineshawaii.org.



Above and below: Sustainable Coastline volunteers at one of their beach clean ups

Career Development

The HTA works with various entities and educational institutions to support career development programs for Hawai'i's visitor industry.

Through collaborative efforts, the HTA facilitates and coordinates with various organizations, such as the Department of Education's (DOE) Career and Technical Education (CTE), the University of Hawai'i Community Colleges and ClimbHI, a local non-profit organization. Through these organizations, the HTA is able to engage Hawai'i's youth and provide an academic pathway into one of the state's largest industries as well as educate them as to the varied and exciting career opportunities in Hawai'i's visitor industry.

Engaging the visitor industry's current workforce is also important to ensure that the state is providing visitors with authentic experiences with the aloha spirit. The HTA supports training programs to current employees in the visitor industry that aim to enhance guest experiences.

Major highlights as evaluated by HTA staff:

- Created two academic pathways – Hotel Operations and Travel Industry Management (TIM) – to prepare high school students who are interested in a future career in the visitor industry;
- Reached 17 high schools across the state to offer hospitality and tourism programs;
- Expanded the Lead, Expose, Inspire (LEI) career development program to reach 700 student participants statewide;
- Produced the first public service announcement (PSA) to support the DOE CTE programs to increase awareness about the programs and enrollment; and
- Added TIM into the DOE CTE PBA (Performance-Based Assessment) for the first time.

Reaching Hawai'i's Youth through LEI

For the past three years, the HTA has supported the Lead, Expose, Inspire (LEI) career development event that provides Hawai'i's youth with understanding of and exposure to career opportunities in the visitor industry.

Konomi Tran, a Kapi'olani Community College (KCC) student, participated in LEI as a high school student and returned to help as a mentor following her high school graduation. The program allowed her to gain a greater understanding of one of the state's largest

economic drivers and piqued her interest in a career in hospitality.

"As a student at KCC in the TIM program, I am able to learn more about this industry," said Konomi. "We are able to visit hotels and learn about the importance of tourism to the state; tourism really helps to bring money into the state's economy."

Konomi was able to share the experiences she gained through LEI and the KCC TIM program with other students and show them the exciting opportunities that Hawai'i's visitor industry has to offer.

For more information on the LEI program, visit climbhi.org.



Konomi Tran with fellow LEI mentors at the 2014 event



Trini Ka'ōpuiki in the HTA's DOE CTE commercial

Safety and Security

The HTA supports agencies and organizations that are responsible for the safety and security of visitors to the state, with the overall goal of ensuring that Hawai'i continues to be a safe destination. It is required that half a percent of the tourism special fund is utilized towards this initiative.

Through the Visitor Assistance Programs (VAP), the HTA is able to provide assistance and aloha to visitors who come to the Hawaiian Islands that have been affected by a crime or other adversities during their stay.

As the lead visitor industry agency during times of crisis, the HTA also cultivates efforts in safety and security information and communications, as well as preventative education, to the state's visitor industry.

Major highlights as evaluated by HTA staff:

- Produced an in-flight video to include a safety message for visitors arriving to the state;
- Coordinated ongoing and timely updates to Hawai'i's visitor industry and local media during Hurricane Iselle and Hurricane Ana to ensure visitors to the state were aware and informed of the situation.
- Participated in the statewide preparedness exercise, Makani Pāhili, and has taken on an active role in emergency planning for the state by participating in the visitor evacuation-transportation and marshalling site sub-committees; and
- Translated the Safety eBrochure into Chinese, Korean and Japanese, which are available online on the HTA's Travel Smart Hawai'i website at travelsmarthawaii.com.

Keeping Visitors in Maui County Safe

For the last 17 years, the Visitor Aloha Society of Hawai'i (VASH) has been helping visitors who encounter hardship while visiting the Hawaiian Islands, with a dedicated organization in each county. VASH Maui County is led by Director **Janet Kuwahara** who is also the office manager for the Maui Visitors Bureau.



Janet Kuwahara

Aside from the assistance that VASH Maui County provides to visitors in need, Janet and the organization hold an annual emergency preparedness conference for Maui County's visitor industry. The third annual event was held in September and brought emergency responders and the visitor industry together to discuss best practices during emergency

situations.

"Through our emergency preparedness conference, we have been able to increase awareness of VASH Maui County and expanded our contacts," said Janet. "This has helped us in notifying visitor industry stakeholders and their guests during emergency situations."

Janet and the VASH Maui County team also put together a short safety video that will be broadcast at the Kahului Airport. The video provides visitors with a reminder to take precautions and be safe while visiting the Hawaiian Islands.

For more information on VASH Maui County, contact Janet at janet@mauivb.com.



The HTA's Crisis Command Center featured on KITV News



The Japanese, Chinese and Korean versions of the Travel Smart Hawai'i brochure



Brand Experience

Overview

The purpose of the brand experience area is to create, develop and support programs and projects that deliver unique experiences that align with Hawai'i's people, place and culture.

Programs

Product Enrichment

Programs that are initiated by the community that support efforts to perpetuate the Hawaiian culture, maintain Hawai'i's environmental resources and ensure a quality tourism product and experience. Included are the:

- *County Product Enrichment Program (CPEP);*
- *Natural Resources Community-Based Program (NRCBP); and*
- *Kūkulu Ola – Living Hawaiian Culture Program (LHCP).*

Signature Events

Major events that the HTA wants to align with its destination brand.

Product Development

Programs and/or events that the HTA wants to create and/or cultivate.

Greetings Program (Kāhea)

Programs that create a sense of place at visitor entry and exit points.

Product Enrichment Programs

The Product Enrichment Program (PEP) consists of three (3) programs: County Product Enrichment Program (CPEP), Kūkulu Ola: Living Hawaiian Culture Program (LHCP)*, and Natural Resources Community-Based Program (NRCBP)*.

The overall goal of PEP is to support diverse, community-initiated programs that enhance visitor experiences and residents' quality of life, as well as create opportunities for economic development, natural resource management, and perpetuation of the Hawaiian culture. The HTA issues a request for proposals for each program every year, which are reviewed by a selection committee of members from the HTA and the community. In 2014, the HTA supported 91 projects through CPEP, 22 projects through LHCP, and 25 through NRCBP.

A full listing of the events supported by the HTA can be found on page 48.

**Additional information on the Kūkulu Ola: Living Hawaiian Culture Program (LHCP) and Natural Resources Community-Based Program (NRCBP) are located on page 48.*



Ka'ūpulehu Dryland Forest



Brent Imonen (left) at Duke's OceanFest

Celebrating the Legacy of Hawai'i's Greatest Waterman

As an Olympic swimmer and pioneer of surfing, Duke Kahanamoku has helped to bring global prominence to ocean sports and the shores of Waikīkī. In celebration of his legacy, the Outrigger Duke Kahanamoku Foundation (ODKF) created an annual summer event in Waikīkī called Duke's OceanFest. For the past eight years, the event's executive director, **Brent Imonen**, has coordinated everything from operations and marketing to sponsorship development.

"The purpose of this event is to support the development of individuals and organizations that serve and perpetuate Hawai'i's water sports community in the spirit of Duke Kahanamoku," said Brent.

For the past three years, the HTA has supported this unique event through CPEP that attracted

2,000 participants from around the world to celebrate sports synonymous with Duke, including longboard surfing, paddleboard racing, swimming, tandem surfing, surf polo, beach volleyball and stand-up paddling. Thousands of spectators also had the opportunity to participate in a recent addition to the event, "Hawaiian Nights," a program that previously highlighted Hawaiian music and talk story sessions, and this year featured surf films including the 50th anniversary viewing of *Endless Summer*, among others.

"We continue to enhance Duke's OceanFest to provide enjoyable experiences not only for participants and spectators but for other visitors and residents. We are also looking forward to partnering with Waikīkī Beach vendors to offer services to attendees to provide authentic experiences and help generate additional business for local companies," added Brent.

For more information on this event, visit dukesoceanfest.com.

Signature Events

The HTA's Signature Events program supports major events that provide visitors with unique and enriching experiences, while valuing and perpetuating Hawai'i's natural resources and Hawaiian culture, honoring its people and traditions, as well as celebrating its diverse multi-cultures and community. Marketability (i.e. exposure, market penetration, etc.) is one of the key components by which the HTA measures these events and the purpose is to help the destination remain competitive and to stimulate demand from key and emerging markets.

Signature Events are held throughout the year and are broken down into the following areas:

- Major Festivals;
- Native Hawaiian Festivals; and
- Select Sporting Events.

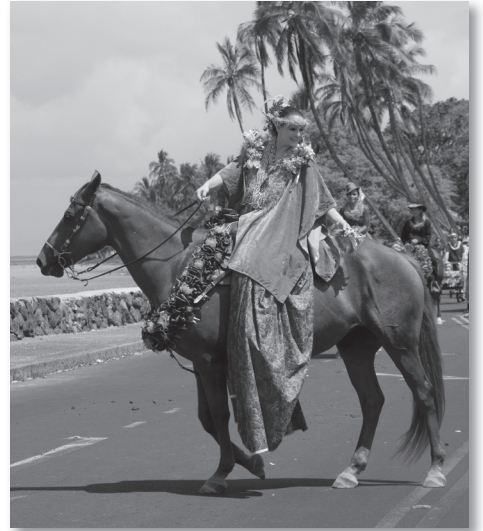
A full listing of events supported by the HTA can be found on page 49.

Major highlights as evaluated by HTA staff:

- The Hawai'i Food and Wine Festival, celebrating Hawai'i's regional cuisine, which has become the premier culinary event for the state held during the slower fall shoulder period. In 2014, the event expanded

to Hawai'i Island, in addition to Maui and O'ahu;

- The annual King Kamehameha Celebration commemorating the legacy of King Kamehameha I, which this year, the HTA helped to expand statewide; and
- Pac Rim Sand Volleyball Championships Hawai'i: This inaugural tournament is a youth beach volleyball event in November that features junior teams from Hawai'i, Continental U.S.A., Canada, Japan and China.



King Kamehameha Parade on Maui



Merrie Monarch Festival in Hilo



Fireworks at the 2014 Hawai'i Food & Wine Festival event at Ko Olina

Sharing the Hawaiian Culture through Hula

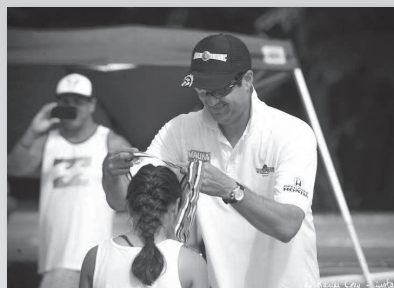
For 37 years, the Moanalua Gardens Foundation (MGF) has been hosting the Prince Lot Hula Festival, the largest non-competitive hula competition in Hawai'i. For many years, the HTA has supported this popular free event that both visitors and residents from around the world have come to look forward to and attend year after year.

Pauline Worsham, managing director for MGF, has helped to grow the event from a simple hula exhibition to a prominent cultural event that also now includes tattoo workshops, cultural demonstrations, handcrafters fair and concerts.

This year, the MGF launched the Malia Kau award to recognize kumu hula who are the keepers of the Hawaiian culture. Five kumu hula were recognized at the 2014 festival who have distinguished themselves as leaders of the Hawaiian cultural renaissance and have made immense contributions to the Prince Lot Hula Festival.

"We have seen visitor attendance grow year after year and are proud to provide an authentic cultural experience for them," said Pauline. "The support HTA provides helps maintain these special events, which differentiate Hawai'i from other tourist destinations and make coming here so special."

For more information on the Prince Lot Hula Festival, visit moanalugardensfoundation.org.



Kevin Wong presenting an award at a beach volleyball tournament

Inaugural Beach Volleyball Event Held in 2014

As an island state, Hawai'i's sandy shorelines create the perfect venue for beach volleyball, one of the fastest growing and most successful emerging sports in the world. It is also now one of the four most watched sports during the summer Olympics, ranked among track and field, swimming and gymnastics.

Therefore, the inaugural Pac Rim Sand Volleyball Championships on Queen's Beach in Waikīkī served as a natural fit as a new HTA Signature Event. Spearheading the event is

Hawai'i-born Kevin Wong, a former Olympian and current director of Spike and Serve, a non-profit organization that aims to positively shape lives through volleyball.

"Waikīkī is believed to be the birthplace of beach volleyball, when Duke Kahanamoku and George 'Dad' Center first played the game nearly 100 years ago," said Kevin. "This historical legacy and our year-round good weather create an authentic and enjoyable experience for players and spectators from around the world."

The competition is anticipated to bring in more than 80 teams of world-class athletes from the U.S., Canada, Japan, China, Philippines and Hawai'i. The event will also include volleyball clinics and activities for kids, and is expected to draw both participants and spectators from around the world to Kau. In addition, the competition will be recorded for local, national and international broadcast.

For more information about the Pac Rim Sand Volleyball Championships, visit pacrimhi.com.



Palani Vaughn with Pauline Worsham at the 2014 Prince Lot Hula Festival on O'ahu

Product Development Programs

The HTA fosters and cultivates programs and projects to provide a variety of offerings for visitors through the Product Development program. Through this initiative, the HTA strives to develop new destination offerings and support existing ones with the goal that they become more successful and self-sustaining. The goals of this program are to:

- Create new experiences;
- Support tourism products that provide unique experiences; and
- Develop marketing and product development toolkits targeted toward the visitor industry and communities interested in marketing, promoting and developing tourism products.

Major highlights as evaluated by HTA staff:

- “May Day Waikīkī: Beach Boys, Memories and Music,” an event celebrating the tradition of Lei Day and honoring iconic Waikīkī Beach Boys;
- ‘Ahamele: Monthly Hawaiian Music Series, a concert series sharing Hawaiian music and dance with kama‘āina and visitors across the state throughout 2014; and
- Mele Mei, a month-long celebration of Hawaiian music through workshops, concerts and the Nā Hōkū Hanohano Awards ceremony for local artists.

Developing New Ways to Celebrate Old Traditions

In celebration of Hawai‘i’s Lei Day tradition, the HTA worked with **John Aeto**, president of The Kālaïmoku Group to create a new event called “May Day Waikīkī: Beach Boys, Memories and Music.”

The event, which included performances by award-winning Nā Leo Pilimehana and hula dancers, honored the Waikīkī Beach Boys, who served as Hawai‘i’s original tour guides, concierges and booking agents, helping to put Waikīkī on the map. They continue to be ambassadors of aloha that promote the sport of surfing. The event also

included an all-faiths service and prayer for those who now call Waikīkī Beach their final resting place.

“This May Day event was created to add an innovative twist to traditional Lei Day celebrations,” said John. “We were able to perpetuate this annual custom while also recognizing the heritage and significance of iconic Waikīkī Beach and those that made it famous.”

John and The Kālaïmoku Group also organized seven additional concerts throughout the year as part of the ‘Ahamele: Monthly Hawaiian Music Series, which highlighted the talents of local artists.

For more information about the event, visit facebook.com/MayDayWaikiki.



Nā Leo Pilimehana and hula dancers perform at the May Day event in Waikīkī



Mike McCartney at the May Day event in Waikīkī



‘Ahamele: Monthly Hawaiian Music Series on Hawai‘i Island

Greetings Program

In order to create truly memorable experiences, it is important that visitors experience the aloha spirit from the moment they arrive to the moment they leave the Hawaiian Islands. Since Hawai'i's airports are often the first and last stop of a visitor's experience, the HTA created and implemented a greetings program at all the state's major airports. The program helps to create a sense of place and highlights Hawai'i's people, place and culture, offering an opportunity to engage visitors while they are in transit to and from the islands.

The HTA worked closely with the Department of Transportation and airport personnel to create unique, positive experiences for visitors.

Major highlights as evaluated by HTA staff:

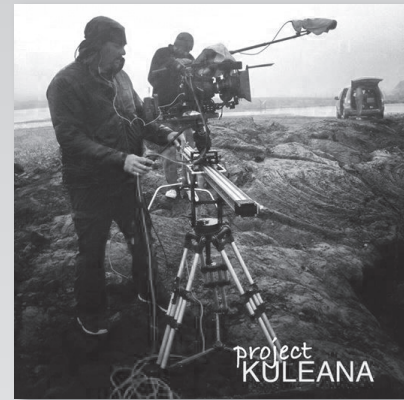
- Continued Hawaiian music and hula at all major airports;
- Continued Hawaiian language announcements at various airports throughout the Hawaiian Islands;
- Developed a new in-flight welcome and safety video for airlines;
- Established cultural and destination content displays as well as displays for events and activities at airports; and
- Conducted service and hospitality training for airport employees.

Creating Lasting First Impressions

Visitors to Hawai'i arrive and depart the state's airports to greetings in not only English, Japanese and Chinese, but also in Hawaiian. The HTA worked to further extend this demonstration of the state's host culture by creating an in-flight welcome video to be used by all airlines with incoming flights to the state.

Nā'ālehu Anthony, owner and CEO of Palikū Documentary Films is a Native Hawaiian filmmaker with 15 years in the industry, contracted by the HTA for this project.

The in-flight film features messaging done in Hawaiian welcoming visitors and kama'āina and shares information on safety, geography, activities, as well as a calendar of events. The video features Amy Kalili, who is also included in the airport greetings, and provides an authentic voice coming from her experience working in the Hawaiian language



Nā'ālehu Anthony on a shoot for another HTA supported project, Project Kuleana

revitalization movement.

"Through the work we do, we've consistently been an advocate for promoting a true reflection of the many unique and positive attributes that celebrate the Hawaiian culture and its people," said Nā'ālehu. "We are grateful for the opportunity to perpetuate the Hawaiian language and hope to continue to be able to share it in more public spaces throughout the state."

For more information, visit palikudocfilms.com/live



Amy Kalili in the HTA's in-flight welcome video



Brand Management

Overview

The purpose of the Brand Management area is to attract visitors to the Hawaiian Islands through destination branding and marketing support, as well as access and business development.

Programs

Access

Three (3) programs to further support and develop access to the state of Hawai'i. Included are:

- Route Development Program;
- Airline Development Program; and
- Cruise Development Program.

Major Market Management

The HTA has contracted eight (8) organizations to promote Hawai'i with intent to add two more markets in 2015. Current coverage in the major market areas are:

- North America (U.S. West, U.S. East and Canada)
- Japan;
- China;
- Korea;
- Taiwan;
- Oceania (Australia and New Zealand);
- Europe (Germany, UK, Sweden and Italy); and
- Latin America (Argentina, Mexico and Brazil).

Business Destination Management

The HTA has contracted two (2) organizations; one with the emphasis on generating and converting business from North America and the other to manage and market the Hawai'i Convention Center.

Brand Development Projects

Projects and/or programs to carry out the brand development of Hawai'i. Majority of the projects and/or programs have a connection to the travel trade and visitor industry.

gohawaii.com

The development and maintenance of the gohawaii.com websites.

Access

As an island state, access to the Hawaiian Islands continues to be an essential program for the HTA to ensure there is sufficient air and cruise availability to meet demand.

Air seats continued to increase during the first half of 2014 and are projected to finish the year at nearly 11.2 million seats, an increase of 3.9 percent over last year. That equates to more than 420,000 additional seats servicing the Hawaiian Islands.

Earlier forecasts suggested a slight dip in air seats from North America. Hawaiian Airlines, however, redeployed aircrafts from international to domestic routes, creating a shift in the market, with seats from North America projected to be up 4.6 percent over last year.

While Hawai'i's cruise industry remains a relatively small portion of arrivals to the state, it continues to be an important market that provides visitors with a unique experience in coming to and visiting the Hawaiian Islands. While visitor arrivals in the cruise market in 2012 and 2013 were strong, there was a slight decline in 2014. This was largely due to fewer foreign cruise ships coming to the state as well as an increase in smaller ships with less capacity.

Major highlights as evaluated by HTA staff:

- Expanded routes in the Asia Pacific region, including new service from Beijing, China and additional service from Brisbane, Australia;
- Continued discussions with international carriers for future air service to the Hawaiian Islands; and
- Developed a scheduling system for the statewide harbors to create greater ease for scheduling of all ships that port in the state.

AIR SEATS OUTLOOK

Market	2013 Total	2014 Projected	% Change*
Domestic	7,206,155	7,536,324	4.6%
International	3,562,564	3,635,282	2.0%
Total	10,768,719	11,171,606	3.7%

New Leadership for the State's Airports

The HTA works collaboratively with the state's airports to ensure that visitors to the Hawaiian Islands start and end their vacation experiencing the aloha spirit.

Ross Higashi, deputy director of the airports division for the State Department of Transportation (DOT), has nearly 25 years of experience in Hawai'i's transportation industry and was recently appointed deputy director overseeing operations, administration, and the capital and financial programs for the airport.

"The HTA has an in-depth understanding and ability to attract new and repeat visitors from around the world to the Hawaiian Islands,

which allows Hawai'i to have a sustainable tourism economy," said Ross.

"Their role has helped Hawai'i remain a top visitor destination and the airports division has been a direct beneficiary."

Under Ross' leadership, the DOT airports division will continue to improve operational service at the airport and implement modernization projects, all of which will benefit not only visitors to the state, but residents as well.

For more information and updates on the state's airports, visit hidot.hawaii.gov/airports/.



Ross Higashi

Easing Scheduling at Hawai'i's Ports and Harbors

In 2014, the HTA contracted **The Mariner Group** to assist the state in creating a single maritime vessel scheduling software for the state to ease scheduling for Hawai'i's cruise industry.

Both the Department of Transportation (DOT) and the Department of Land and Natural Resources (DLNR) utilize and manage the state's ports and

harbors. The new system that The Mariner Group is tasked with creating will integrate the ports into a single, electronic system that will provide greater efficiencies in easing vessel scheduling and dock space utilization.

"This system will enable cruise ships and other vessels to easily schedule visits to ports around the Hawaiian Islands," said Greg Melon, marketing manager for The Mariner Group. "We are excited to bring our maritime situation awareness and expertise to ports throughout the state."

The state-of-the-art system and technology will help to maximize revenue potential for the cruise lines and the state, and grow Hawai'i's market share of cruise business to the Hawaiian Islands.

For more information on The Mariner Group, visit commandbridge.com.



The Mariner Group's Command Center

Branding

The HTA continued to focus its efforts on branding the Hawaiian Islands in 2014 in order to maintain momentum from a record-breaking 2013. By working collaboratively with its global contractors and industry partners, the HTA was able to maintain visitor spending and arrivals in 2014 with year-over-year increases in both spending and arrivals.

In order to diversify Hawai'i's tourism profile, the HTA has focused efforts on stimulating growth and interest from the Asia-Pacific region. Through efforts put forth by the HTA's global contractors, arrivals and spending over the last few years have increased year-over-year with international arrivals now making up 39 percent of the market compared to 34 percent in 2010, an increase of more than 600,000 visitors.

In 2014, the HTA initiated three new contracts with destination marketing organizations in China, Taiwan and Latin America to promote Hawai'i. Currently, the HTA has representation by contractors in a total of eight (8) major marketing areas (MMA) including: Hawai'i Visitors and Convention Bureau (HVCB), North America; Hawai'i Tourism Japan (HTJ); Hawai'i Tourism Oceania (HTO), Australia and New Zealand; Hawai'i Tourism Korea (HTK); Hawai'i Tourism China (HTC); Hawai'i Tourism Taiwan

(HTT); Hawai'i Tourism Europe (HTE), United Kingdom, Germany, Switzerland, France, and Italy; and Hawai'i Tourism Latin America (HTLA), Brazil, Mexico and Argentina.

The HTA contractors are responsible for developing strategic plans and cooperative programs, including advertising, public relations, promotions, travel trade marketing, education and training, and stakeholder communications and relations.



David Uchiyama presenting market updates

VISITOR STATISTICS

Total **	2013 Total	% Change*	2014 Target	% Change*
Arrivals	8,174,461	1.8%	8,250,937	0.9%
Expend. (\$ mil.)***	\$14,421.3	1.2%	\$14,698.2	2.0%
U.S. West				
Arrivals	3,211,429	1.0%	3,170,160	-1.3%
Expend. (\$ mil.)	\$4,806.3	3.6%	\$4,904.9	2.1%
U.S. East				
Arrivals	1,701,852	0.1%	1,713,540	0.7%
Expend. (\$ mil.)	\$3,544.6	3.2%	\$3,649.7	3.0%
Canada				
Arrivals	517,011	3.6%	531,560	2.8%
Expend. (\$ mil.)	\$1,083.0	5.9%	\$1,142.2	5.5%
Japan				
Arrivals	1,518,517	3.6%	1,548,700	2.0%
Expend. (\$ mil.)	\$2,486.0	-9.1%	\$2,445.4	-1.6%
Other Asia				
Arrivals	335,072	15.6%	388,870	16.1%
Expend. (\$ mil.)	\$710.8	18.7%	\$833.9	17.3%
Oceania				
Arrivals	355,568	30.2%	372,380	4.7%
Expend. (\$ mil.)	\$877.1	37.1%	\$847.6	-3.4%
Europe				
Arrivals	136,805	5.8%	149,140	9.0%
Expend. (\$ mil.)	\$321.6	10.1%	\$367.2	14.2%
Latin America				
Arrivals	30,265	18.6%	27,060	-10.6%
Expend. (\$ mil.)	\$74.2	19.9%	\$71.0	-4.4%

* Year-over-year growth

** Total arrivals and expenditures include air and cruise statistics. All others refer to air arrivals only.

*** Does not include supplemental business expenditures. With supplemental business expenditures 2013 total is \$41,520.5 million.

North America

North America is Hawai'i's largest visitor market, which includes the U.S. West (11 Pacific states west of the Rockies), U.S. East (all other states) and Canada markets. The U.S. economy maintained its upward momentum, strengthening travel demand for Hawai'i in 2014 and helped to boost arrivals and spending for the market.

However, increased vacation costs and growing competition from other destinations remained challenges for Hawai'i. To overcome these obstacles, the HTA and its North America contractor, the Hawai'i Visitors and Convention Bureau (HVCB) focused efforts on trade and consumer education.

Major highlights as evaluated by HTA staff:

- HVCB was recognized as the leading Destination Marketing Organization for social media according to Skift, an online travel intelligence agency;
- Chicago and San Francisco Market Saturation programs which included: TV, radio, print, online and out-of-home advertising; consumer promotions and events; public relations including media visits; and travel trade education through webinar training, travel trade blitzes, events and meetings; and
- New and improved travel trade training program which included a revamped website and training portal for travel professionals, updated training programs, a centralized database and communications strategy.

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Education through First-Hand Experiences

HVCB's **Robyn Basso** brings two decades of experience to her role as senior director of travel industry partnerships, leading the North America team and managing the development and execution of HVCB's sales and marketing strategy.

This year, the HVCB again partnered with Questex Hospitality + Travel Group for their 5th annual Hawai'i Travel Exchange in November on Maui. The four-day event included destination seminars, one-on-one meetings and networking opportunities for industry partners to connect with 80 to 100 top-producing, pre-qualified travel agents from North America, particularly from the Midwest and East Coast regions. Following the event, participating agents took part in a three-day, single-island FAM trip to different islands to gain first-hand travel experiences of Hawai'i's unique offerings.

"Through our various touch points with travel advisors, we continue to cultivate a high interest in the destination," said Robyn. "There are so many differences between the Hawaiian Islands and the best way to understand what each offers is to create opportunities for travel advisors to gain first-hand knowledge and experience the destination. We are thrilled to have another opportunity to work with Hawai'i Travel Exchange to help accomplish this goal."

Robyn's success in travel trade initiatives like these have recently earned her the recognition as the number one destination salesperson by "TravelAge West," a major print and online travel trade publication.



Robyn Basso presenting lei at an HVCB event

VISITOR STATISTICS

U.S. West	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	3,211,429	3,170,160	-1.3%	2,696,362	0.3%
Expend (\$ mil.)	\$4,806.3	\$4,904.9	2.1%	\$4,097.4	2.9%
PPPD Spending	\$156.5	\$161.3	3.1%	\$160.9	3.3%
Air Seats***	6,373,358	6,365,295	-0.1%	5,548,646	4.2%

U.S. East	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	1,701,852	1,713,540	0.7%	1,452,455	0.3%
Expend (\$ mil.)	\$3,544.6	\$3,649.7	3.0%	\$3,089.6	3.0%
PPPD Spending	\$198.9	\$201.8	1.5%	\$204.6	2.7%
Air Seats***	832,797	837,214	0.5%	705,169	1.3%

Canada	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	517,011	531,560	2.8%	407,751	1.3%
Expend (\$ mil.)	\$1,083.0	\$1,142.2	5.5%	\$840.0	2.8%
PPPD Spending	\$164.1	\$165.0	0.6%	\$162.1	0.3%
Air Seats***	367,825	386,517	5.1%	307,933	7.5%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Japan

Japan, Hawai'i's largest international market, remained stable in 2014, with steady arrivals and slight declines in spending down due to the strengthening of the dollar against the yen. The HTA continued to work with its contractor Hawai'i Tourism Japan (HTJ) to find new and innovative ways to market the Hawaiian Islands to this mature market.

With the economic reform in Japan, HTJ collaborated with industry partners to implement various campaigns to counter the short-term decline in arrivals as airlines adjusted their seat inventory and consumers watched their discretionary spending.

Major highlights as evaluated by HTA staff:

- The first U.S. concert for Japanese sensation, boy-band Arashi during the fall shoulder period, which brought more than 15,000 visitors and generated an estimated \$20 million in direct visitor spending;
- HTJ's first official Aloha Program Satellite Office in Osaka, which offers only Hawai'i travel packages, in collaboration with H.I.S., one of Japan's top travel agencies. More than 1,100 customers attended the opening weekend, resulting in 300 bookings by HTJ Aloha Program certified travel agents. HTJ plans to open additional satellite offices in Nagoya and Hokkaido; and
- The roll out of the Ultra Hawai'i Campaign capitalizing on the popularity of the multi-generational Japanese character Ultraman, which resulted in an estimated ad value of \$1 million for the state and 1.6 billion impressions.



Jessica Michibata, Hawai'i beauty ambassador, with the Ultraman characters

VISITOR STATISTICS

Japan	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	1,518,517	1,548,700	2.0%	1,267,166	0.0%
Expend (\$ mil.)	\$2,486.0	\$2,445.4	-1.6%	\$2,023.6	-2.8%
PPPD Spending	\$275.7	\$270.9	-1.8%	\$275.1	0.2%
Air Seats***	2,029,288	2,089,741	3.0%	1,693,337	0.8%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Taking Hawai'i by Storm

The highly anticipated two-day "Arashi Blast in Hawai'i" concerts by Japanese boy-band sensation, Arashi, helped to attract thousands of Japanese visitors to the less frequented Ko Olina area and filled rooms island-wide during Hawai'i's slower travel period in September.

Playing a role in approaching, pitching, securing and coordinating the concert was HTJ Vice President **Mitsue Varley** who worked with Johnny & Associates (the largest entertainment company in Japan), travel agencies, airlines and other entities in Japan and locally.

"We spent more than two years working on bringing this concert to Hawai'i," said Mitsue. "Arashi is the single largest group to come out of Asia. Bringing this caliber of entertainment to Hawai'i provided a huge opportunity not only to increase Japanese visitor arrivals but also to generate incredible media exposure for the destination."

In between performances, the band spent time talking about their experiences in Hawai'i and their connection with the islands, providing additional exposure for the destination. The concerts were also broadcast in movie theaters throughout Japan, where more than 100,000 tickets were immediately sold out.

The 15,000 concert travel packages sold through major travel wholesaler partner in Japan resulted in



Popular Japanese boy band Arashi

18 charter flights exclusively for concertgoers, accounted for 38,000 hotel room nights and generated more than \$20-million in visitor spending.

"With the success of this concert, we continue to explore new partnership opportunities in Japan and Hawai'i to identify and create new ways to attract Japanese visitors to the state," added Mitsue.

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Mitsue Varley (top row, second from left) with the HTJ team

China

The China market gained new representation in 2014 under Hawai'i Tourism China (HTC), through contractor Travel Link Marketing, which has offices in four major cities in China: Beijing, Shanghai, Guangzhou and Chengdu. This vast and growing market continued to see double-digit growth in arrivals and expenditures for the first ten months of the year, as well as remained the highest daily spenders at an average of \$399 per person per day.

With new non-stop flights from Beijing to Honolulu that commenced in 2014, Hawai'i now has direct service from two of China's largest cities: Shanghai and Beijing. These flights have provided a boost in Chinese arrivals, where visitors previously had to transit through Korea or Japan.

The process to obtain a U.S. visa in China has also eased, though there are still challenges in attracting meetings conventions and incentives (MCI) groups who require a 100 percent visa approval. Coupled with new stricter regulations on government spending and an anti-corruption movement under new Chinese leadership, outbound Chinese business travel in 2014 is anticipated to be down compared to last year.

Major highlights as evaluated by HTA staff:

- Created the first online Hawai'i micro-documentary movie in cooperation with Air China, which received 10.3 million hits in the first month;
- Launched a romance Hawai'i campaign in Beijing, Shanghai and Guangzhou and the creation of the first romance Hawai'i guide for the China market; and
- China Leisure Mission in Beijing, Shanghai, and Guangzhou with record high attendance from Hawai'i (31 Hawai'i partners) and 400 Chinese travel agents.

VISITOR STATISTICS

China	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	125,011	152,650	22.1%	140,632	27.3%
Expend (\$ mil.)	\$304.9	\$385.1	26.3%	\$362.0	37.5%
PPPD Spending	\$394.0	\$384.5	-2.4%	\$399.0	2.7%
Air Seats***	42,903	118,402	176.0%	115,971	229.0%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Promoting a Standout Destination in China

At the beginning of 2014, Brenda He, general manager and managing director for Travel Link Marketing, took on the task of leading her team to market the Hawaiian Islands in China as the HTA's new contractor. With more than 20 years of experience in destination marketing, Brenda and her team work towards growing Chinese outbound travel to the Hawaiian Islands.

One of the key initiatives that HTC focuses on is featuring Hawai'i as a stand-alone destination. Currently, Hawai'i is often positioned as a stop-over destination to continue on to the continental United States. Working with both Air China and Hawaiian Airlines with their recent non-stop Beijing service will also help to support this initiative for Hawai'i in the China market.

"We want to continue to increase awareness of Hawai'i in China," said Brenda. "One of the ways to do that is by focusing on marketing Hawai'i as a single, stand-alone destination. This will help to increase Chinese visitors' length of stay and also



Brenda He presenting at the 2014 Tourism Conference

spending, who are still the largest daily spenders in Hawai'i."

Through the efforts of Brenda and her team, they have been able to feature more than 200 Hawai'i-only packages and products in China. They also successfully led the team to organize more than 20 seminars in more than 15 cities for Chinese travel agents and educate them on the value of a Hawai'i-only vacation package.

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Tourism industry partners at the Hawai'i Tourism China Leisure Sales Mission

Korea

For the past five years, the Korea market experienced year-over-year, double-digit growth in visitor arrivals and spending.

With a positive economic outlook and continual growth throughout the year, the HTA projected another year of double-digit increases in 2014.

Hawai'i Tourism Korea (HTK), the HTA's contractor, continued to promote the Hawaiian Islands in this growing market. Maintaining and growing airlift continued to be a priority in the Korea market through ongoing partnerships with airlines to increase load factors and a push for the entrance of a potential new non-stop flight from Busan, the second largest city in Korea. By focusing its efforts on the family and FIT segments, HTK was able to promote weekday departures during shoulder periods.

Major highlights as evaluated by HTA staff:

- Received \$1.7 million in media exposure for Hawai'i as a romantic destination through JTBC's unique TV show concept, "Show Off Your Husband and Win a Free Trip to Hawai'i";
- Partnered with "Golf Digest," a top golf magazine and "Noblesse," a top premium magazine, to hold golf clinics on Hawai'i Island with celebrity professional Korean golfer Se Ri Pak, promoting Hawai'i as a premier golf destination; and
- Conducted the Hawai'i Travel Mission 2014 in Seoul and Busan, which brought 40 Hawai'i partners from 23 companies who met with more than 250 key travel professionals and 40 media in Korea.



HTK blogger press trip in Hawai'i

VISITOR STATISTICS

Korea	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	177,113	194,870	10.0%	159,768	12.6%
Expend (\$ mil.)	\$331.4	\$366.6	10.6%	\$291.0	9.7%
PPPD Spending	\$268.0	\$268.6	0.2%	\$258.92	-1.6%
Air Seats***	379,810	409,855	7.9%	285,159	-10.8%

*Year-over-year growth **YTD through Oct. 2013 ***Source: Scheduled seats from Diio schedules

Promoting Hawai'i through the Power of Blogging

Joining HTK in 2012, **Liz You** was named director of marketing and public relations in 2014, and

handles all travel trade marketing and public relations.

This year, HTK brought two major blogger FAM tours to the islands, which resulted in extensive positive exposure for Hawai'i.

Partnering with Sony Korea, Liz and the HTK team brought 19 influential bloggers to experience an eight-day, multi-island trip to O'ahu, Maui, Kaua'i and Hawai'i Island. Each blogger developed their own itineraries and provided "how-to" travel guides on social media. Their posts on Korea's popular Naver blog site, Facebook and Twitter reached approximately 62 million total visitors and resulted in blogger-inspired travel packages with Korea's top online travel agencies.

The HTK-sponsored Wifelogger FAM capitalized on the popularity of three affluent wife bloggers and their influence on shopping, cuisine, golf, relaxation and hotels. Their coveted lifestyles are each



Liz You (second from right) with the HTK team

followed by thousands per day. HTK also partnered with "J Look," a luxury membership magazine, to document their trip to Hawai'i, which generated an additional half a million dollars in media exposure.

"Bloggers in Korea have tremendous influence and reach," said Liz. "Partnering with prominent bloggers and major brands like Sony allowed us to expand our reach and increase interest in travel to Hawai'i."

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Taiwan

In 2014, the HTA contracted with a new contractor, JW1 Marketing, to market Hawai'i in Taiwan. Based in Taipei, Hawai'i Tourism Taiwan (HTT) has been working to grow international outbound travel to the Hawaiian Islands.

Supported by Taiwan's entrance into the visa waiver program and the launch of new non-stop service from Taipei to Honolulu by China Airlines with two weekly daily flights, there has been a renewed interest in Hawai'i as a visitor destination. Despite the loss of three weekly non-stop flights with Hawaiian Airlines' departure from the market, air seats for 2014 are still anticipated to be up nine percent compared to 2013.

Hawai'i competes with short-haul destinations that offer attractive and affordable deals such as Japan, Thailand and the Philippines. With a new contractor in Taiwan, the HTA anticipates continued growth from the region, using unique strategies to build travel partnerships and attract visitors to the Hawaiian Islands.

Major highlights as evaluated by HTA staff:

- Initiated the first Leisure and MCI mission in Taiwan, which garnered participation from 21 Hawai'i partners, 60 travel agents and 25 corporations;
- Conducted a major consumer online campaign, "Dream Mission," where entrants uploaded photos and stories about Hawai'i to win a trip to the Hawaiian Islands, which received more than 300 submissions, 300,000 votes, and more than \$60,000 in media exposure; and
- Held a major consumer event in July called the Hawai'i Carnival, with Hawaiian music, hula, food and Hawaiian tour packages reaching 50,000 participants in two weeks.

VISITOR STATISTICS

Taiwan	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	22,679	27,350	-10.6%	16,620	-10.7%
Expend (\$ mil.)	\$41.3	\$48.1	16.4%	\$28.5	-18.0%
PPPD Spending	\$237.9	\$238.3	0.2%	\$212.2	-10.8%
Air Seats***	40,777	78,393	92.2%	39,057	39.9%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Growing Social Media Fans for the Hawaiian Islands

Andrew Koh, newly appointed managing director of Hawai'i Tourism Taiwan (HTT), has more than eight years of industry experience which he brings to help promote the destination in this developing market.

With a decline in direct service from Taiwan in 2014, Andrew and his team launched the HTT's "Dream Mission" campaign to enhance destination awareness in the market. The social media campaign, which provides attractive travel content on Hawai'i Tourism Taiwan's Facebook dramatically increased the number of fans from 400 to 16,000 in the span of a few months.

"We continue to develop and promote out-of-the-box ideas by empowering our team to be creative in our marketing efforts," said Andrew. "We anticipate seeing growing interest in Hawai'i as a destination and will continue to work toward growing outbound



HTT photo campaign initiative to increase social media presence

travel to the Hawaiian Islands."

HTT has collaborated with Hawai'i's visitor industry to create programs that highlight the unique people, place and culture of the islands to encourage visitor arrivals from Taiwan by increasing the overall awareness and exposure of Hawai'i.

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Andrew Koh (center) presenting winners of the HTT "Dream Mission" campaign with their prizes

Oceania

In the Oceania market, which consists of Australia and New Zealand, Hawai'i is represented by their contractor, Hawai'i Tourism Oceania (HTO).

The market has continued to experience strong and consistent growth in arrivals. The arrivals from Oceania have been supported by increases in airlift from the region over the past few years. In 2014, new service out of Brisbane, Australia commenced along with additional flights from Auckland, New Zealand.

Through incremental airlift and innovative promotions by HTO, Hawai'i has remained a popular destination, and continued growth is expected out of this market.

Major highlights as evaluated by HTA staff:

- The Aloha Down Under road show held in Christchurch and Auckland, New Zealand and Melbourne, Sydney and Brisbane, Australia where HTO conducted business-to-business sessions, professional networking events, and a media lunch, reaching more than 900 travel professionals;
- HTO-supported Hawaiian Airlines' inaugural Sydney Harbor Challenge, a 20-kilometer outrigger canoe race held in Australia's capital, which brought nearly 93 crews and thousands of spectators from around Australia to get a taste of Hawai'i's unique culture; and
- One of Australia's most popular lifestyle shows, "The Living Room," shot five episodes in the Hawaiian Islands, which was promoted across news, online and social media reaching an estimated audience of 654,000.



Host of "The Living Room" enjoying the Hawaiian Islands

VISITOR STATISTICS

Oceania	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	355,568	372,380	4.7%	308,435	3.7%
Expend (\$ mil.)	\$877.1	\$847.6	-3.4%	\$711.4	-2.8%
PPPD Spending	\$259.5	\$246.3	-5.1%	\$252.0	-3.3%
Air Seats***	416,863	415,355	-0.4%	354,176	1.5%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Reaching Aussies through Social Media

This year, HTO promoted marketing manager **Ashlee Galea** to country manager for the Australia market. Through her innovative ideas and successful marketing efforts, Ashlee brings a fresh approach to marketing the destination.

Aside from the successful annual Aloha Down Under road show, which reached more than 900 travel agents, Ashlee and HTO have also focused on increasing awareness of the Hawaiian Islands in Australia through social media. Platforms like HTO's "Aloha Down Under" Facebook page have been well received among Aussies who travel, have traveled or plan to travel to Hawai'i. With more than 35,000 likes, HTO's Facebook page has become an extremely powerful tool for destination marketing in Oceania.

"HTO aims to increase the desirability of Hawai'i as a visitor destination by showcasing the incredible beauty, unique Hawaiian culture and diversity of each of the islands," said Ashlee. "Our efforts to promote the Hawaiian Islands through social media and other successful marketing efforts have



Ashlee Galea with HTA's Mike McCartney and Mike Story, and the HTO team at a networking brunch

contributed to consistent growth out of Oceania. In 2009, visitor arrivals were 128,625 and nearly tripled to a record high of 353,063 in 2013, with anticipated year-over-year growth in 2014."

HTO aims to connect both Australians and New Zealanders with the Hawaiian Islands and assist in giving them the opportunity to have a unique travel experience to discover Hawai'i's people, place and culture.

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Europe

In 2014, outbound travel from Europe was forecasted to increase, which helped to contribute to year-over-year growth from this market, up 5.2 percent as of October. The HTA's Hawai'i Tourism Europe (HTE) office continued its marketing efforts in France, Italy and Switzerland, with emphasis in the United Kingdom (U.K.) and Germany.

The HTE continued to focus on educational trainings, sales calls and fulfillment of consumer, travel trade and media requests, in addition to its annual "Aloha Up 'n Over" sales and media mission in Germany and the U.K.

Major highlights as evaluated by HTA staff:

- Brought a French product manager FAM tour to Hawai'i for the first time in more than eight years to experience O'ahu, Kaua'i and Hawai'i Island, which received positive feedback about the unique characteristics of each island;
- Coordinated a U.K. media press trip to O'ahu and Maui themed "Hip Hawai'i," which included stays at the Modern Hotel, Westin Maui, Sheraton Maui and Turtle Bay, and a variety of activities such as surfing, whale watching, sunrise at Haleakalā, visits to the Bishop Museum, Kualoa Ranch, Pearl Harbor, Ali'i Kula Lavender Farm and Surfing Goat Dairy; and
- Established a partnership with Expedia in the U.K. and Germany, in conjunction with Brand USA, which included the development of a Hawai'i microsite featuring destination information, special packages and promotions in the spring and fall shoulder seasons.

VISITOR STATISTICS

Europe	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	136,805	149,140	9.0%	123,929	5.2%
Expend (\$ mil.)	\$321.6	\$367.2	14.2%	\$278.1	1.3%
PPPD Spending	\$176.9	\$189.0	6.8%	\$174.0	-1.7%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

Showcasing the Diversity of Hawai'i in the United Kingdom

Sola Thomson is the newest team member of Hawai'i Tourism Europe (HTE), bringing eight years of industry experience to her role as the U.K. account manager. Her business relationships have helped HTE in securing several new promotions.

She worked with Expedia, the U.K.'s top tour operator in sales to Hawai'i, to promote the Hawaiian Islands in Expedia's TV advertisements during the primetime airing of "The X Factor." The exposure resulted in more than \$1.6-million in ad value for Hawai'i.

Sola and her team also coordinated a luxury press trip to the islands, which included some of the U.K.'s major media including "The Telegraph," "Country and Home," "The Irish Times" and "Press Association." The trip highlighted high-end experiences including hiking Diamond Head, horseback riding and surf lessons on O'ahu, as well as whale watching, a feast at Lele Lūa'u and tours of East Maui waterfalls and Tedeschi Vineyards on Maui.

"These types of initiatives allow us to garner extensive exposure for Hawai'i and showcase the unique offerings of the destination," said Sola. "We are very passionate about promoting the diversity of the Hawaiian Islands and look forward to raising awareness of the destination in the coming years."



HTE's newest team member Sola Thomson

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Germany FAM at Kona Beach Hotel

Latin America

While still a developing market, Latin America is expected to be one of the top sources of incremental travelers over the next several years, according to the National Travel and Tourism Office (NTTO April 2014). South America will generate nearly 2.2 million more outbound visitors, a 43 percent increase compared to 2013. In 2014, arrivals from Latin America were slightly down for the first ten months of the year, but are expected to grow in 2015.

In anticipation of this potential growth, the HTA hired Focus Latam as its new Hawai'i Tourism Latin America (HTLA) contractor in March 2014. HTLA represents the destination in major market areas including Brazil, Mexico and Argentina to enhance Hawai'i's travel trade and media relations, build destination brand awareness, provide education and training, and develop travel promotions.

Major highlights as evaluated by HTA staff:

- Participated in the World Travel Market Latin America in Sao Paulo, Brazil in April, the leading travel tradeshow in Latin America;
- Brought a travel trade FAM with product managers from Mexico to O'ahu and Maui; and
- Coordinated a multi-island press trip to O'ahu, Maui and Hawai'i Island, which included major media outlets from both Brazil and Mexico.

VISITOR STATISTICS

Latin America	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	30,265	27,060	-10.6%	24,626	-2.5%
Expend (\$ mil.)	\$74.2	\$71.0	-4.4%	\$58.1	-0.9%
PPPD Spending	\$222.2	\$227.5	2.4%	\$215.8	-2.9%

*Year-over-year growth **YTD through Oct. 2014 *** Source: Scheduled seats from Diio schedules

Enhancing Hawai'i's Appeal in Latin America

Director Leandro Rattazzi brings 18 years of destination marketing experience to his role as strategic counsel for HTLA. Together with his Project Manager Andrea Giorgetti, HTLA works with travel trade and media partners in Brazil, Mexico and Argentina to develop strategies to sell and promote travel to Hawai'i.

"Latin Americans are becoming savvy travelers who are seeking alternative destinations that offer a different culture and new experiences," said Leandro. "Hawai'i's sandy beaches and surf are already famous in Latin America, so we want to promote other unique destination offerings to capture new visitors to the Hawaiian Islands."

In the fall, HTLA coordinated a FAM tour for top wholesalers, managers and luxury travel agents from Mexico to increase their destination knowledge and enhance current, and create new Hawai'i packages and promotions.

To increase general consumers' destination awareness, HTLA brought major media from Brazil and Mexico to Hawai'i in September for

a multi-island press trip to O'ahu, Maui and Hawai'i Island. Media exposure from the press trip have been published through the end of year, reaching 400,000 readers and 20 million monthly views of "O Globo" newspaper in Brazil and up to 264,000 readers in Mexico through "El Universal" newspaper, "El Economista" and "Bleu & Blanc" magazines.



Leonardo Rattazzi presenting at the Hawai'i Tourism Conference

HTA Latin America Liaison

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Hawai'i Tourism Latin America

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Mexico FAM Trip at Sheraton Waikiki

Meet Hawai'i

In 2014, the HTA's Meet Hawai'i team – HVCB's meetings, conventions and incentives (MCI) department, the Hawai'i Convention Center (HCC) and the HTA's international marketing contractors – welcomed a new partner to the team: AEG Facilities, one of the world's leading venue management organizations, which now manages the HCC. Together, Meet Hawai'i worked toward both short- to mid-term single property meetings and incentive growth as well as securing long-term bookings for the HCC.

In comparison to five years ago, Hawai'i's MCI market is up 22 percent. Increased interest in the Hawaiian Islands as an incentive and global conference destination for international companies has generated approximately 286,000 arrivals, an 8.3 percent increase, through October 2014.

By revamping creative collateral with new video and photography and refining

and aligning messaging throughout global marketing promotions, Meet Hawai'i continues to enhance Hawai'i's brand as an MCI destination.

Major highlights as evaluated by HTA staff:

- Enhanced the successful Meet Hawai'i 'Elele (Ambassador) Program through new partnerships with local community leaders with strong ties to national and international organizations to attract mutually beneficial meetings for the HCC;
- Coordinated the first Meet Hawai'i International FAM with all global meeting contractor specialists, which included destination seminars, training workshops and industry partner networking events, site inspections and a multi-island FAM tour on O'ahu, Hawai'i Island and Kaua'i; and



Meet Hawai'i's newsletter

- Utilized market research to target and secure vertical industry segments that have a higher propensity to book MCI travel to Hawai'i, including companies rewarding employees, building retention or launching a new product.

Positioning Hawai'i as a Global Meetings Destination

In January 2014, AEG Facilities, one of the world's leading venue management organizations, began overseeing operations of the HCC, joining the HVCB's MCI department and the HTA's international marketing contractors Meet Hawai'i team.

Vickie Omura joined HCC/AEG in July as the vice president for citywide sales and marketing bringing more than 30 years of experience in Hawai'i's visitor industry. She

oversees day-to-day operations of the HCC's sales and marketing department.

One of the first initiatives Vickie took responsibility for was working with the Meet Hawai'i team to update Hawai'i Convention Center stock photo and video to ensure that Hawai'i is being marketed in an accurate manner. Providing prospective clients with the most current and dynamic sales material plays a significant role in the decision-making process for meetings destinations or locations.

With AEG and HCC joining forces, Vickie and the Meet Hawai'i team plan to leverage this connection and are working to further position Hawai'i as a global meetings destination through AEG's vast portfolio of national and international customers across five continents.

"The facilities that AEG operates in Asia and Oceania, as well as those on the west coast really allows Hawai'i to be positioned as a bridge between

east and west," said Vickie. "We have created a synergy amongst our facilities and associates and intend to capitalize on that to bring more MCI business to the state."

HTA MCI Liaison

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HVCB

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Meet Hawai'i/HCC/AEG Facilities

Vickie Omura
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Vickie Omura at the Hawai'i Tourism Conference

Brand Development

The HTA's brand development programs aim to enhance marketing efforts and opportunities for Hawai'i's visitor industry, as well as support the HTA's marketing contractor initiatives.

One of the goals of the HTA is to ensure that those who market and promote the Hawaiian Islands are equipped with the proper tools and knowledge. Projects supported by the HTA through brand development, focus on providing local and global travel trade partners with resources to support their understanding and promotions of the Hawaiian Islands.

Major highlights as evaluated by HTA staff:

- Coordinated the Hawai'i delegation at the U.S. Travel Association's 2014 International Pow Wow event in Chicago where more than 125 appointments were conducted with the HTA's marketing contractors and island chapters to educate and promote the Hawaiian Islands among international tour operators and media;
- Successfully implemented the Mahalo Month for travel industry Professionals program that provides special rates and offers for accommodation, transportation, attractions, restaurants, and activities during the slower spring shoulder period to say 'mahalo' to out-of-state travel professionals who sell and promote the destination, as well as provide an opportunity to enhance destination awareness and education; and
- Participated in The Japan-Hawai'i Tourism Council (JHTC) annual meeting, which helps to maintain Hawai'i and Japan's close relationship and address visitor industry issues and opportunities relating to Hawai'i's largest international market.

Mahalo Month Continues to Provide Deals for Travel Professionals

For the past five years, the HTA's **Mahalo Month** program has created opportunities for travel professionals and trade media from around the world to experience the Hawaiian Islands first-hand. In addition to promoting the destination and stimulating arrivals and spending during the slower spring shoulder period, the program also offers a way for the HTA to say mahalo to those that sell the destination.

The HTA solicits special offers from Hawai'i's visitor industry, from airlines and hotels to restaurants and retailers so that those who sell and promote Hawai'i can better understand and promote Hawai'i's people, place and culture. Mahalo Month runs from April to May, and this year, more than 4,000 travel industry



professionals and registered to take advantage of nearly 100 Mahalo Month offers.

"Through the support of Hawai'i's visitor industry, we have been able to grow the number of discounts and promotions offered through Mahalo Month and in turn enhance interest in travel to Hawai'i through this program," said Caroline Anderson, HTA tourism brand manager. "We've received positive feedback from our domestic and international travel trade partners who participated in Mahalo Month and have continued to share their personal experiences in the Hawaiian Islands with other potential visitors to the state." For more information on Mahalo Month, visit mahalomonth.com.



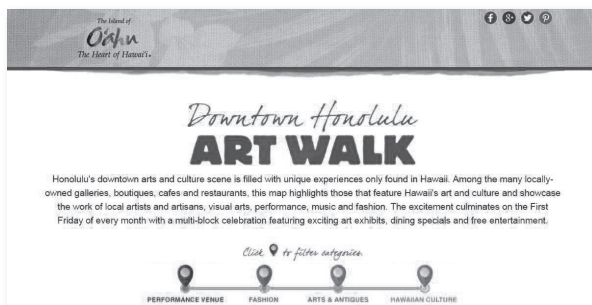
2014 Japan-Hawai'i Tourism Council

Throughout the year, the HTA works with its marketing contractors to maintain and continually enhance their consumer and travel trade *gohawaii.com* websites.

In 2014, the HTA focused on new projects to promote the Hawaiian Islands to the leisure market including the development of mobile websites, Google Trekker microsites, user-generated content integration and a new *gohawaii.com* website in Spanish. On average, the *gohawaii.com* website receives about 836,000 unique visitors per month.

Major highlights as evaluated by HTA staff:

- Created a new “Living in the Moment” island webpages, which feature photography, videos, social media content, interactive customized Google Maps that bring each destination to life and special travel offers to help users plan their vacations. Visit gohawaii.com/livinginthemoment;
- Created the Art Walk Map, a clean, user-friendly online map which displays arts, culture, shopping and restaurant information and directions for O’ahu’s Chinatown and downtown Honolulu district, live on the *gohawaii.com* website through Google Maps. Visit gohawaii.com/artwalk; and
- Established the Arts & Culture webpage, which provides one central location to explore Hawai’i’s art, music, cuisine, dance, and festivals, statewide. Visit gohawaii.com/arts.



Downtown Honolulu Art Walk campaign

Googling through Hawai’i’s Hiking Trails

In 2014, *gohawaii.com* worked with Google Maps to share views of Hawai’i’s hiking trails, beaches and landmarks using a one-of-a-kind device: a Google Maps Street View Trekker backpack.

The Google Maps team partnered with the HVCB and the HTA to lend one of these backpacks to the state, the first time Google loaned out this equipment to a third party. This enabled the HVCB to create extensive, 360-degree panoramic tours for many of the top destinations on Hawai’i Island and O’ahu. The HVCB also worked with some of Hawai’i’s top experts with Hawai’i Forest and Trail on Hawai’i Island and the Department of Land and Natural Resources on O’ahu, Kaua’i and Maui to ensure that the trails were being depicted in a safe and accurate manner.

Street View has been published for dozens of hiking trails, beaches and landmarks throughout the Hawaiian Islands and can serve as planning tools for potential visitors and kama’āina.

“I enjoy being involved in projects here because Hawai’i has such unique cultural diversity and incredible geography,” said Deanna



The Google Trekker camera in Hawai’i

Yick, program manager for Google Maps Street View. “It made sense for Google to select Hawai’i as our first equipment loan partner to showcase the diverse natural beauty of the Hawaiian Islands.”

Google Maps’ success in creating the Trekker Loan Program and partnering with the HVCB has led to continued growth in the use of Google Trekker. Due to the success of the HVCB’s partnership, Google’s Trekker Loan Program now has dozens of other program partners around the world.

To view some of the trails through Google Trekker, visit gohawaii.com/treks/.



Living in the Moment campaign

Communications and Outreach

The HTA's communications program aims to increase awareness and understanding of Hawai'i's tourism economy, visitor industry and the HTA's role and efforts as the state's tourism agency. This includes global marketing and destination brand management programs, community and visitor industry engagement, media relations, crisis communications, issues mitigation, legislative oversight, and distribution of relevant information affecting Hawai'i's tourism economy on an ongoing and timely basis.

Major components of the HTA's communications program include:

- Communications, outreach and public relations including news releases, statements and electronic newsletters;
- Intergovernmental support, research and analysis;
- National Governmental Organization (NGO) memberships;
- Quarterly Industry Video Updates;
- HTA Website;
- Social Media; and
- Hawai'i Tourism Conference.

Major highlights as evaluated by HTA staff:

- Rolled out "Facebook Global Pages" to enhance social media destination promotions for all of the HTA's international contractors and North America contractor;
- Developed Quarterly Industry Video Updates which include in-market updates from each of the HTA's global marketing contractors; and
- Assisted with 312 international media requests through the HTA's International News Bureau, which resulted in media exposure in hundreds of TV, radio, print and online publications in the HTA's major market areas through October 2014.

Redefining the Meaning of Aloha at the 2014 Hawai'i Tourism Conference

Through early and ongoing communications to industry partners and the public via email, social and traditional media, the HTA drew a record 830 attendees to its 2014 Hawai'i Tourism Conference, 'Aha 'Oihana Ho'omāka'ika'i.

The day-and-a-half annual event at the Hawai'i Convention Center in August included local, national and international leading experts in their fields, sharing insight on tourism issues and trends within the ever-evolving travel industry. The HTA's global marketing partners also presented current market conditions and forecasts to provide attendees with in-market trends and partnership opportunities. The purpose is to give industry partners the tools and resources to collaboratively develop their marketing plans for the next year.

The conference also includes the Tourism Legacy Awards luncheon, which honors organizations and individuals who help to perpetuate the Hawaiian culture. This year, the HTA recognized the eight National Park Service parks and sites for their commitment to preserving the natural beauty and maintaining and promoting the cultural heritage and integrity of some of Hawai'i's most prominent attractions.

Throughout the conference, the HTA also strives to incorporate cultural education and inspiration into the program. In addition to the Tourism Legacy Awards, the conference agenda included special presentations by The Hawai'i Pono'i Coalition and cultural keynote speeches about aloha by HTA Board Chair Aaron Salā and Hawai'i Island Mayor Billy Kenoi which were highlights among attendees this year.

For more information on the HTA's communications efforts, visit hawaiiourismauthority.org/news.



Sean Dee, Mike McCartney, Sen. Donna Kim, Ron Williams and David Rae at the Hawai'i Tourism Conference



Brian Lynx presenting during the quarterly video update



Mike McCartney being interviewed for the local news

Tourism Research

Tourism research is the backbone of the HTA's efforts, as a research-based organization. The HTA's Tourism Research Division (TRD) continues to provide data on visitor characteristics and expenditures, data dissemination, marketing research and forecasts, and evaluation and performance measures. The data and information that TRD publishes is utilized to aid state marketing and product development efforts, industry planning, tourism policymaking, and provides economic information on one of the state's largest industries. TRD is also involved in the completion of the Tourism Strategic Plan.

Ongoing programs include:

- Visitor Characteristics and Expenditures Study;
- Post-Visit Visitor Satisfaction and Activities Study;
- Visitor Plant Inventory;
- Visitor Forecasts, Industry Outlook and Market Targets;
- Marketing Effectiveness and Brand Attributes Research;
- Online Media Sentiment Analysis;
- Air Seat Capacity Monitoring; and
- Evaluation and Performance Measures.

To access the HTA's research and reports, visit hawaii tourism authority.org/research.

Major highlights as evaluated by HTA staff:

- Completed the 2014 NFL Pro Bowl visitor impact study;
- Initiated a quarterly timeshare performance report;
- Conducted a special study on vacation rentals in Hawai'i;
- Completed custom marketing research programs in Korea, China and Australia; and
- Conducted extensive work groups, surveys and planning sessions leading up to a draft of the HTA Strategic Plan.

HTA RESEARCH PUBLICATIONS

Available online at hawaii tourism authority.org/research

Publication	Frequency/Distribution
Daily Passenger Counts	Daily
Major Market Area (MMA) Highlights News Release	Monthly, third week of the month
Island Highlights and Arrivals by U.S. Regions (by states and Metropolitan Statistical Area (MSA))	Monthly, third week of the month
Air Seat Capacity Outlook Report (three-month outlook of non-stop flights to Hawai'i)	Monthly, end of the month
Online Media Sentiment Report	Monthly
Arrivals by MMA (Countries)	Monthly
MMA Profiles and Fact Sheets	Quarterly
Visitor Satisfaction and Activities Report of calendar year	Quarterly (brief monitoring report) & Annual (full report), third quarter
Marketing Effectiveness Report	Bi-Annually
Annual Visitor Research Report	Annually, July
Visitor Plant Inventory	Annually

HAWAII TOURISM AUTHORITY

For Immediate Release: August 27, 2014
HTA Release (14-27)

TOTAL VISITOR SPENDING ROSE 2.6 PERCENT TO \$1.4 BILLION IN JULY 2014
Total Arrivals Grew 2.5 Percent While Length of Stay Decreased

HONOLULU – Total expenditures by visitors who came to the Hawaiian Islands in July 2014 rose 2.6 percent from the same month last year to \$1.4 billion*, according to preliminary statistics released today by the Hawaii Tourism Authority. While total arrivals grew 2.5 percent to 772,106 visitors, a shorter average length of stay (-3% to 9.12 days) resulted in flat growth in visitor days (+0.05%). Average daily spending was higher for most visitor markets compared to July 2013.

In July 2014, arrivals by air increased 2.4 percent to 771,244 visitors and one cruise ship visited Hawai'i with 863 visitors (+80%).

Arrivals by air from U.S. West rose 5.1 percent to 327,325 visitors in July 2014, the first increase after 11 months of declines. Increased daily spending (+4.5% to \$155 per person) also contributed to a 7.4 percent growth in U.S. West visitor expenditures to \$483.9 million. While U.S. East arrivals of 175,739 visitors declined 1 percent from July 2013, higher daily spending (+5.6% to \$207 per person) led to a 4.2 percent gain in visitor expenditures to \$360.1 million.

Expenditures by Japanese visitors rose 3.1 percent to \$205.7 million in July 2014, bolstered by growth in arrivals (+1.6% to 131,229 visitors) and increased daily spending (+7% to \$268 per person). During their low season, Canadian visitors spent a total of \$44.6 million, down 16 percent from July 2013. Canadian arrivals dropped 7.4 percent to 27,790 visitors. Arrivals from All Other markets totaled 112,162 visitors (+3.9%) with combined expenditures of \$255.2 million (-5.1%).

Among the four larger Hawaiian Islands, arrivals grew on Kauai (+3.1%), Hawai'i Island (+2%) and Oahu (+1.5%), while Maui remained stable (+0.2%) compared to July 2013. Visitor expenditures increased on Maui (+8.2%), Kauai (+5%) and Hawai'i Island (+1.7%) while visitor expenditures on Oahu were unchanged. However, this month, visitors stayed a shorter period of time on each island compared to July 2013.

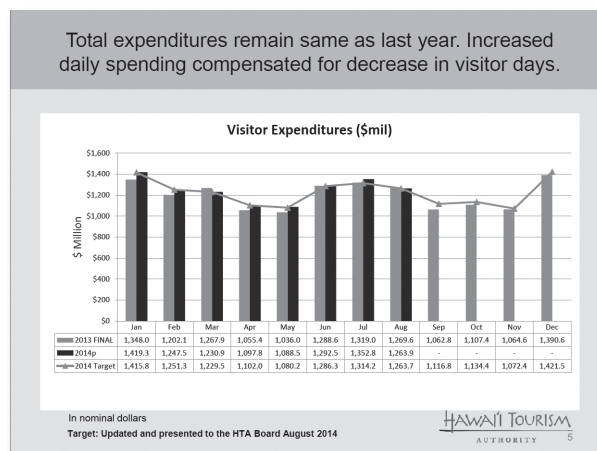
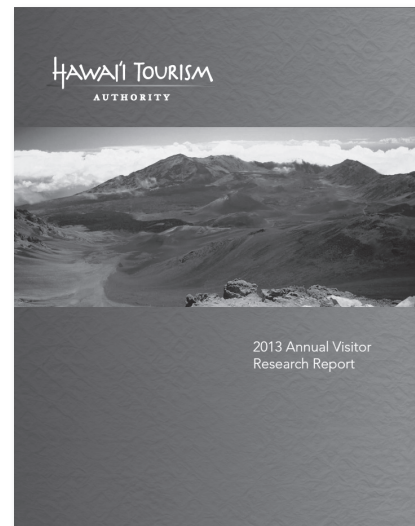
Air capacity to Hawai'i was up 3.7 percent to 1,032,626 total air seats in July 2014. Scheduled seats from Canada (+21.2%), Other Asia (+17.1%), Oceania (+9%), U.S. West (+6%) and U.S. East (+4.2%) increased, offsetting fewer seats from Japan (-5%).

Year-to-date 2014:
Boosted by higher average daily spending (+2.5%), total expenditures by all visitors (by air and by cruise ship) increased 2.5 percent to \$8.7 billion. However, total arrivals barely increased to 4,187,037 visitors (+0.3%) over the first seven months of 2014.

Air arrivals from U.S. West declined 1.7 percent, while arrivals from Japan (+2%), Canada (+2.3%), Other Asia (+21.3%), Europe (+9%) and Oceania (+6.3%) increased, and U.S. East remained relatively unchanged (-0.2%) from a year ago. Visitor expenditures from U.S. West (+7.1% to \$2.9 billion), U.S. East (+3.3% to \$2.3 billion) and Canada (+4.2% to \$688.6 million) were higher but Japanese visitor spending declined (-1.6% to \$1.4 billion).

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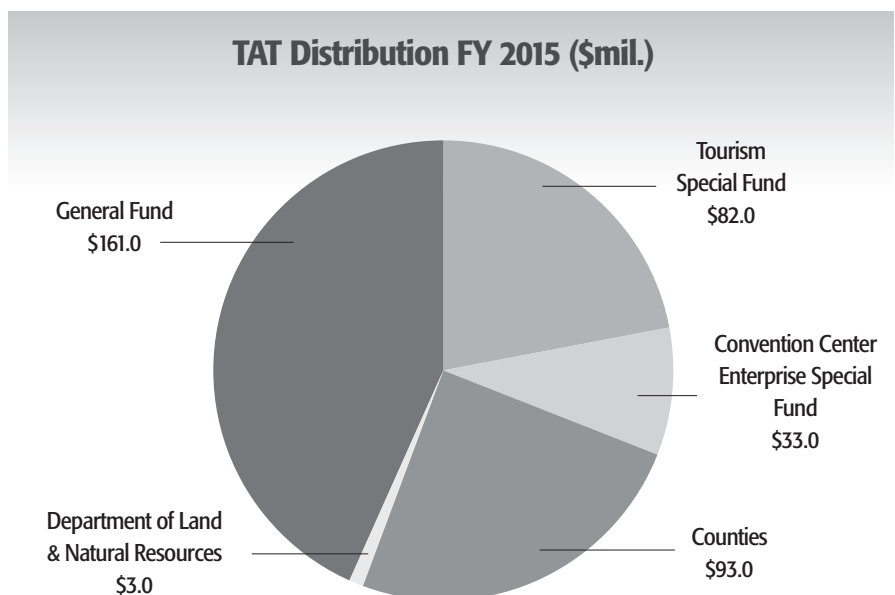
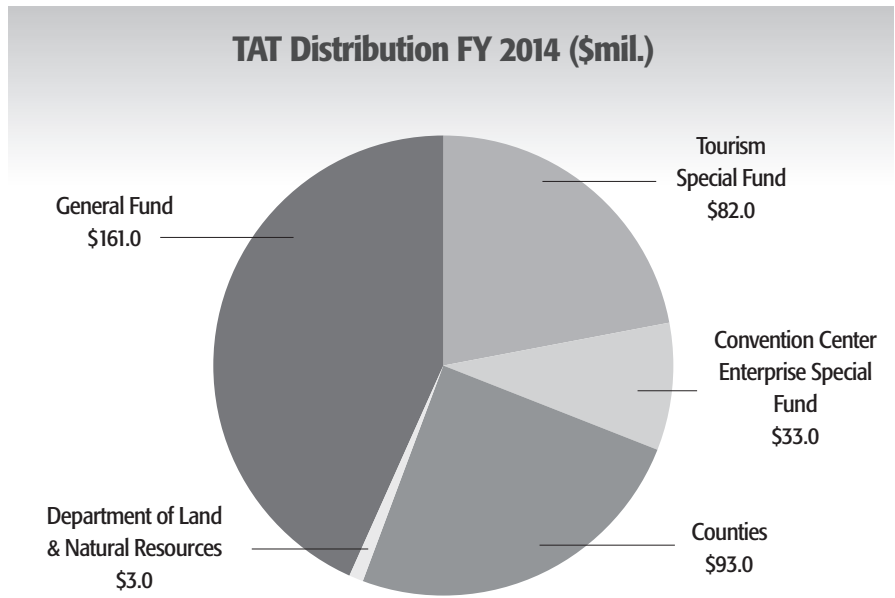
Air arrivals from U.S. West declined 1.7 percent, while arrivals from Japan (+2%), Canada (+2.3%), Other Asia (+21.3%), Europe (+9%) and Oceania (+6.3%) increased, and U.S. East remained relatively unchanged (-0.2%) from a year ago. Visitor expenditures from U.S. West (+7.1% to \$2.9 billion), U.S. East (+3.3% to \$2.3 billion) and Canada (+4.2% to \$688.6 million) were higher but Japanese visitor spending declined (-1.6% to \$1.4 billion).



Transient Accommodations Tax (TAT) Collections

Another measurement of the HTA's performance is the amount of Transient Accommodations Tax (TAT) collections that the state receives each month. The more TAT collected, the more benefits that are accrued to the state as a whole, to the individual counties, and ultimately, benefit Hawai'i residents. Importantly, this revenue finds its way into local communities on each island to support schools, police, infrastructure and parks, and contributes to an improved quality of life. In FY 2014, the state collected a total of \$395.2 million in TAT, which was a 7.2 percent increase from FY 2013 when the total collection was \$368.5 million.

The annual allocation of TAT towards the Tourism Special Fund and Convention Center Enterprise Special Fund is \$82 million and \$33 million, respectively. Additionally, for FY 2014, \$3 million was to be allocated to the State Department of Land and Natural Resources (DLNR), and the expenditure of funds was to be approved by both the HTA and DLNR board of directors.



** Inclusive of \$1 million proviso allocating monies to the State Department of Land and Natural Resources.
Source: State Department of Taxation*

Hawai'i Tourism Authority

Fiscal Year 2014 Actuals

(\$000)

REVENUES	
TAT Deposits - Tourism Special Fund	\$82,000
Investment Pool Interest/Miscellaneous Receipts	480
TOTAL REVENUES	\$82,480
APPROPRIATIONS	
FY 2014	\$87,152
TOTAL APPROPRIATIONS	\$87,152
HTA EXPENDITURES*	
Maintaining Brand	\$ 915
Brand Experience	12,869
Brand Management	52,554
Communications, Community/Government	
Relations and Outreach	506
Tourism Research and Publications	1,892
Strategic Oversight & Governance	3,501
TOTAL HTA EXPENDITURES	\$72,237
<i>* Hawaiian culture is intertwined throughout all areas of HTA activity.</i>	

Hawai'i Convention Center

Fiscal Year 2014 Actuals

(\$000)

REVENUES	
TAT Deposits - Convention Center Enterprise Special Fund	\$33,000
Convention Center Operations	8,276
Subsidy from Tourism Special Fund for Convention Center	
Sales and Marketing	3,074
Investment Pool Interest/Miscellaneous Receipts	158
TOTAL REVENUES	\$44,508
APPROPRIATIONS	
FY 2014	\$54,010
TOTAL APPROPRIATIONS	\$54,010
EXPENDITURES	
Convention Center Operations	\$11,568
Convention Center Sales and Marketing	3,074
Convention Center Repair and Maintenance	1,800
HTA Administrative Allocations	696
<i>(Includes Convention Center Insurance)</i>	
Total Expenditures Prior to Payments on Obligation to	
State Department of Budget & Finance	\$17,138
Payments on Obligation to State Department of Budget & Finance	\$26,429
TOTAL EXPENDITURES	\$43,567

As the fourth busiest international port of entry for visitors to the U.S., O'ahu is hub for the majority of visitor arrivals to the Hawaiian Islands and therefore the gathering place for the destination. Having come off of two record-breaking years in spending and arrivals, O'ahu's visitor market began to stabilize in 2014. While visitor arrivals to the island remained consistent during the first 10 months of 2014, spending declined slightly compared to the same period in 2013 due to shorter length of stay.

Through partnerships with the City and County of Honolulu and the Hawai'i Community Foundation, the HTA was able to highlight O'ahu's unique offerings by supporting 26 County Product Enrichment Programs, eight (8) Natural Resources Community-Based Programs, eight (8) Kūkulu Ola: Living Hawaiian Culture Programs and 18 Signature Events.

VISITOR STATISTICS

O'ahu	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	5,044,276	4,866,660	-3.5%	4,305,433	1.9%
Expend (\$ mil.)	\$7,358.7	NA	NA	\$5,898.7	-3.7%
PPPD Spending	\$209.9	NA	NA	\$202.8	-2.6%

AIR SEATS***

Honolulu	2013 Total	% Change*	2014 YTD**	% Change*
Domestic	4,372,884	3.7%	3,726,200	2.0%
International	3,416,433	12.1%	2,852,094	0.6%
Total	7,789,317	7.2%	6,578,294	1.4%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

TRANSIENT ACCOMMODATION TAX (TAT) TO CITY & COUNTY OF HONOLULU

O'ahu	FY2013	FY2014
TAT (\$mil)	\$41.0	\$41.0

HTA PROGRAMS AND FUNDING

HTA Programs	2013		2014	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	29	\$325,000	26	\$325,000
Kūkulu Ola: Hawaiian Culture Community	9	\$268,000	8	\$220,000
Major Festivals	4	\$591,000	4	\$666,000
Native Hawaiian Festivals	4	\$330,000	4	\$330,000
Natural Resources Community-Based	8	\$291,612	8	\$234,000
Safety & Security	1	\$218,000	1	\$272,000
Sporting Events	7	\$5,212,500	10	\$5,335,000
Career Development**	0	—	0	—
O'ahu Visitors Bureau***		\$3,245,269		\$3,279,269
Total HTA Program Funding		\$10,481,381		\$10,661,269

* The County Product Enrichment Program (CPEP) FY2013 and FY2014 budget is \$400,000 each year, of which no more than \$75,000 can be used for administrative purposes.

** In 2014, the HTA funded 2 statewide Career Development programs at \$84,000 (\$45,000 DOE CTE and \$39,000 LEI).

*** HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.



Iolani Palace, O'ahu

Reviving the Spirit of Kanikapila on O'ahu

In honor of legendary Hawaiian musician Gabby Pahinui, the Nā'ālehu Theater and Pahinui family, began holding the Gabby Pahinui Waimānalo Kanikapila seven years ago at Waimānalo Beach Park. The event started as a gathering of local musicians to play music together, just as they did when Gabby was alive.

Chelle Pahinui is the executive director of Nā'ālehu Theater and has helped to organize the event since its inception in 2007. The event started as a simple gathering of musicians to come together and kani ka pila (play music). Chelle and her team have helped to make the event about an exchange of Hawaiian music and culture.

"Hawaiian music is such an important part of who we are," said Chelle. "It is important to provide venues for our musicians to play together and share their music with the community. We also want to nurture our youth and give them the opportunity to learn and pass this important part of our culture to the next generation."

Last year, the organization also partnered with PBS to produce a promotional video for the event.

With more than 41 million views, the video helped to further promote the Gabby Pahinui Waimānalo Kanikapila and attracted nearly 2,000 visitors and residents to the Waimānalo event.

"Our musicians understand the importance of Hawai'i's visitor industry and how it benefits the community. So while the inception of this event was about the musicians, it has grown to be about our community and creating authentic experiences for both visitors and residents," added Chelle.

For more information, visit gabbypahinui.com.



Chelle and Cyril Pahinui



Musicians performing at the 2014 Gabby Pahinui Waimānalo Kanikapila

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O'ahu Visitors Bureau

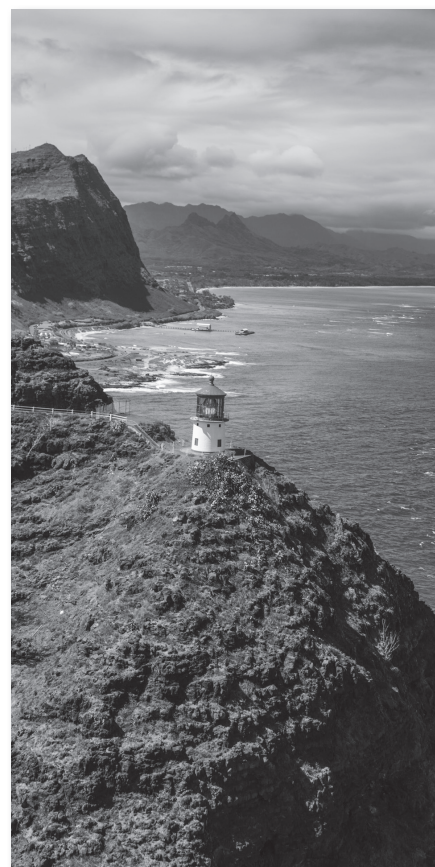
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Visitor Aloha Society of Hawai'i – O'ahu

Jessica Lani Rich
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Makapu'u Lighthouse, O'ahu

Maui, Molokaʻi, Lānaʻi

Maui County, which includes Maui, Molokaʻi and Lānaʻi, provide visitors with a variety of unique experiences found only in the Hawaiian Islands. With some of the state's most luxurious resorts, unspoiled coastlines and world-class events, these islands continue to be popular vacation options for visitors wishing to get away from the hustle and bustle. Arrivals and spending for Maui and Molokaʻi continued to increase through October 2014 while Lānaʻi experienced declines in comparison to 2013.

In 2014, the HTA supported various events in Maui Nui in partnership with the County of Maui and the Hawaiʻi Community Foundation to support 23 County Product Enrichment Programs, five (5) Natural Resources Community-Based Programs, three (3) Kūkulu Ola: Living Hawaiian Culture Programs and six (6) Signature Events.

VISITOR STATISTICS

Maui County	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	2,401,733	NA	NA	2,013,400	0.6%
Expend (\$ mil.)	\$3,778.0	NA	NA	\$3,452.7	10.8%
PPPD Spending	\$190.9	NA	NA	\$208.83	1.9%

Maui Island	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	2,358,784	2,415,335	2.4%	1,982,182	0.8%
Expend (\$ mil.)	\$3,668.3	NA	NA	\$3,369.9	11.4%
PPPD Spending	\$190.3	NA	NA	\$208.7	9.1%

Molokaʻi	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	55,157	56,090	1.7%	47,742	5.7%
Expend (\$ mil.)	\$30.1	NA	NA	\$26.5	6.3%
PPPD Spending	\$113.8	NA	NA	\$124.7	3.2%

Lānaʻi	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	74,310	77,208	3.9%	54,512	-12.1%
Expend (\$ mil.)	\$79.6	NA	NA	\$56.3	-14.8%
PPPD Spending	\$307.0	NA	NA	\$319.6	2.7%

AIR SEATS***

Kahului	2013 Total	% Change*	2014 YTD**	% Change*
Domestic	1,671,934	3.6%	1,477,455	5.9%
International	171,994	2.1%	136,961	2%
Total	1,843,928	3.5%	1,614,416	5.5%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

TRANSIENT ACCOMMODATION TAX (TAT) TO MAUI COUNTY

Maui	FY2013	FY2014
TAT (\$mil)	\$21.2	\$21.2



Molokini Island, Maui

HTA Programs	2013		2014	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	22	\$305,000	23	\$345,000
Kūkulu Ola: Hawaiian Culture Community*	0	–	3	\$85,000
Major Festivals	3	\$165,000	1	\$105,000
Native Hawaiian Festivals	2	\$60,000	2	\$60,000
Natural Resources Community-Based	4	\$90,700	5	\$136,000
Safety & Security	1	\$46,000	1	\$46,000
Sporting Events	3	\$565,000	3	\$565,000
Career Development*	0	–	0	–
Maui Visitors and Convention Bureau**		\$2,882,071		\$2,877,071
Moloka'i Visitors Association**		\$244,741		\$244,741
Destination Lāna'i**		\$143,000		\$143,000
Total HTA Program Funding		\$4,501,512		\$4,606,812

* The County Product Enrichment Program (CPEP) FY2013 and FY2014 budget is \$400,000 each year, of which no more than \$75,000 can be used for administrative purposes. In FY2014, \$20,000 was rolled over from FY2013.

** HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.

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Maui County

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Perpetuating the Tradition of Paddle Boarding

Eighteen years ago, when paddle boarding was making a comeback, race director **Mike Takahashi** and his team at Epic Sports Foundation, decided to capitalize on resurgence of the sport by creating a paddle boarding race from Moloka'i to O'ahu. The Moloka'i 2 O'ahu Paddleboard World Championship has since become an annual event held every July that attracts some of the best athletes in traditional paddle boarding and stand-up paddle boarding, as well as ocean enthusiasts.

Starting at Kaluakoi on Moloka'i and ending at Maunalua Bay Beach Park on O'ahu, the 32-mile race crosses the Ka'iwi Channel – also known as the Moloka'i Channel – one of the most treacherous bodies of water in the Hawaiian Islands.

"The Moloka'i Channel is known for its revered power, and crossing it is regarded worldwide as a crowning achievement in paddle boarding," said Mike. "The sport dates back to when Polynesians navigated thousands of miles across the ocean, and this event allows us to perpetuate the Native Hawaiian tradition of paddle boarding."

In 2014, nearly 300 entrants participated in the race with more than half coming from out-of-state with their family and friends. Mike and his team also began streaming the event live to provide viewers the opportunity to watch the race and virtually experience the beautiful

shorelines and scenic views of both Moloka'i and O'ahu.

"As a visitor destination, Hawai'i is an ideal setting for the race, since it has the infrastructure for us to welcome more participants from around the world and further expand the event," added Mike. "The race also provides exposure for the unique sporting event opportunities that the state has to offer."

For more information on the event, visit molokai2oahu.com.



Mike Takahashi viewing the Moloka'i 2 O'ahu Paddleboard World Championship

Kaua'i

Kaua'i is the smallest and oldest of the four major Hawaiian Islands though still able to attract more than one million visitors each year. Its lush landscape and relaxed pace creates a peaceful setting that draws visitors back year after year, who this year spent \$1.2 billion on the island during the first 10 months of the year, seven percent more than the previous year's record.

The HTA supported 24 County Product Enrichment Programs, three (3) Natural Resources Community-Based Programs, two (2) Kūkulu Ola: Living Hawaiian Culture Programs and three (3) Signature Events in partnership with the County of Kaua'i and Hawai'i Community Foundation that provided both visitors and residents with experiences found only in the Hawaiian Islands.

VISITOR STATISTICS

Kaua'i	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	1,114,354	1,123,951	0.9%	930,062	-1.1%
Expend (\$ mil.)	\$1,390.6	NA	NA	\$1,233.8	6.9%
PPPD Spending	\$163.3	NA	NA	\$172.5	6.5%

AIR SEATS***

Lihu'e	2013 Total	% Change*	2014 YTD**	% Change*
Domestic	581,754	1.1%	519,747	6.4%
International	18,514	12.7%	24,708	90.9%
Total	600,268	1.4%	544,455	8.6%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

TRANSIENT ACCOMMODATION TAX (TAT) TO KAUA'I COUNTY

Kaua'i	FY2013	FY2014
TAT (\$mil)	\$13.5	\$13.5

HTA Programs	2013		2014	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	28	\$325,000	24	\$350,000
Kūkulu Ola: Hawaiian Culture Community*	2	\$79,000	2	\$50,000
Major Festivals	1	\$63,500	1	\$63,500
Native Hawaiian Festivals	1	\$20,000	1	\$20,000
Natural Resources Community-Based	5	\$169,372	3	\$80,000
Safety & Security	1	\$53,000	1	\$53,000
Sporting Events	1	\$25,000	1	\$25,000
Career Development*	0	–	0	–
Kaua'i Visitors Bureau**		\$2,285,893		\$2,280,893
Total HTA Program Funding		\$3,020,765		\$2,280,893

* The County Product Enrichment Program (CPEP) FY2013 and FY2014 budget is \$400,000 each year, of which no more than \$75,000 can be used for administrative purposes. In FY2013, \$4,200 was rolled over from FY2012 and \$20,000 rolled over from FY2013.

** HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.



Hanalei Pier, Kaua'i



Waimea Town Celebration

Keeping Community Traditions Alive on Kaua'i

For 38 years, residents and visitors have enjoyed the Waimea Town Celebration, Kaua'i's largest and oldest annual festival celebrating the culture and traditions of the tight-knit community.

Through the support of **Thomas Nizo**, chairperson of the event, and the West Kaua'i Business and Professionals Association (WKBPA), the event has grown from a two-day event to a week-long celebration. With nearly 18 years of participating and supporting the Waimea Town Celebration, Thomas knew that despite challenges involved in growing the event, enhancing festivities would provide more opportunities for visitors and residents to appreciate Kaua'i's unique offerings.

"The HTA provides support to all of the islands and through the funding we received through CPEP, we were able to expand the festival to an eight-day event," said Thomas. "We were able to add events that

highlighted Kaua'i's history, culture and music."

In 2014, the event attracted more than 17,000 attendees, nearly 7,000 of which were visitors to the island. Thomas and the WKBPA continue to look at ways to continue improving the event to gain more exposure and create memorable experiences and lasting impressions for the island of Kaua'i.

For more information, visit waimeatowncelebration.com.



Thomas Nizo at the Waimea Town Celebration

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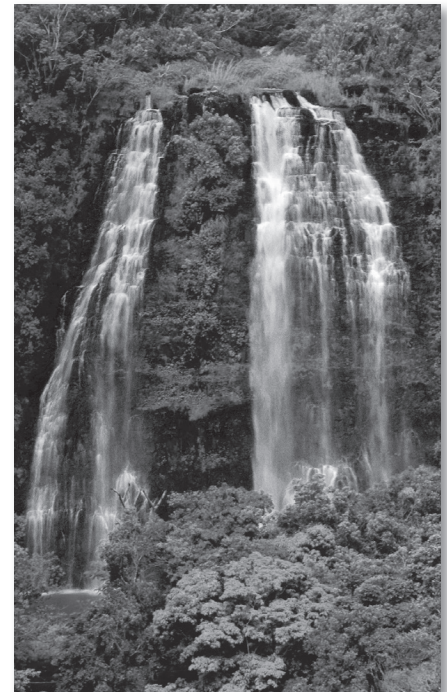
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Hanalei Pier, Kaua'i

Hawai'i Island

As the largest of the Hawaiian Islands, Hawai'i Island continues to draw visitors to experience its rich culture and diverse landscapes, including one of the few places in the world to see an active volcano. Visitor spending for the first 10 months of the year increased 5.4 percent to \$1.6 billion for the island.

The HTA continues to work towards reopening Kona Airport as a second international port of entry to ease and enhance foreign arrivals to both Hawai'i and the U.S.

By highlighting 18 County Product Enrichment Programs, seven (7) Natural Resources Community-Based Programs, five (5) Kūkulu Ola: Living Hawaiian Culture Programs and seven (7) Signature Events in partnership with the County of Hawai'i and Hawai'i Community Foundation, the HTA was able to highlight the diversity of Hawai'i Island that both visitors and residents are able to enjoy.

VISITOR STATISTICS

Hawai'i Island	2013 Total	2014 Target	% Change*	2014 YTD**	% Change*
Arrivals	1,435,245	1,626,038	13.3%	1,199,580	-0.7%
Expend (\$ mil.)	\$1,825.2	NA	NA	\$1,595.0	5.4%
PPPD Spending	\$170.9	NA	NA	\$178.4	3.4%

AIR SEATS***

Kona	2013 Total	% Change*	2014 YTD**	% Change*
Domestic	588,403	-3.4%	539,221	10.3%
International	26,311	22.7%	28,469	49.6%
Total	614,714	-2.5%	567,690	11.8%

Hilo	2013 Total	% Change*	2014 YTD**	% Change*
Domestic	48,588	-17.1%	38,664	-5.1%
International	0	NA	0	NA
Total	48,588	-17.1%	38,664	-5.1%

*Year-over-year growth **YTD through Oct. 2014 ***Source: Scheduled seats from Diio schedules

TRANSIENT ACCOMMODATION TAX (TAT) TO COUNTY OF HAWAII

Hawai'i Island	FY2013	FY2014
TAT (\$mil)	\$17.3	\$17.3

HTA Programs	2013		2014	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	18	\$329,200	18	\$345,000
Kūkulu Ola: Hawaiian Culture Community*	1	\$25,000	5	\$52,000
Major Festivals	1	\$63,500	1	\$63,500
Native Hawaiian Festivals	4	\$125,000	4	\$107,500
Natural Resources Community-Based	5	\$185,258	7	\$250,000
Safety & Security	1	\$117,500	1	\$120,500
Sporting Events	3	\$390,000	2	\$380,000
Workforce Development	0	–	0	–
Big Island Visitors Bureau**		\$2,236,356		\$2,231,356
Total HTA Program Funding		\$3,471,814		\$3,549,856



Akaka Falls, Hawai'i Island

* The County Product Enrichment Program (CPEP) FY2013 and FY2014 budget is \$400,000 each year, of which no more than \$75,000 can be used for administrative purposes. In FY2013, \$4,200 was rolled over from FY2012 and \$20,000 rolled over from FY2013.

** HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.

Celebrating Science, Fiction and Fantasy on Hawai'i Island

As one of the most ecologically diverse locations on the planet, Hawai'i Island is an ideal setting for HawaiiCon, a comic convention that celebrates science, fiction and fantasy. The event highlights the natural wonders found on Hawai'i Island, while also showcasing the island's advancements in science and technology.

Jessica Hall, HawaiiCon's convention operations officer, helped to plan and launch the 2014 inaugural event at the Hāpuna Beach Prince Hotel in September 2014. Attendees had the opportunity to meet celebrities from science fiction shows and movies, comic book artists and writers, and well-established, renowned scientists. Compared with the larger comic conventions, HawaiiCon creates a more intimate and idyllic setting that showcases the aloha spirit of the destination.

Through word-of-mouth and targeting science-fiction fan bases, the first annual event was able to attract nearly 800 attendees, many of which were out-of-state visitors. Event goers also had the option to experience the scientific and



Jessica Hall at the 2014 HawaiiCon

geological assets of Hawai'i Island through optional tours offered through the event.

"We were pleased with our turnout for our inaugural event," said Jessica. "Many of the attendees who were first-time visitors to Hawai'i, stayed longer than the three-day event, and also visited other islands. Our goal for 2015 is to reach 1,000 attendees. In the long term, we would like to see this become an anchor event for Hawai'i Island, that draws thousands of visitors during the slower September period."

For more information, visit hawaiiicon.com.



Inaugural HawaiiCon Event

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King Kamehameha Statue, Hawai'i Island

Brand Experience Program Listings

Product Enrichment

2014 Kūkulu Ola Awards

O'ahu

Hawai'i Academy of Performing Arts,
*21st Century Loku House: New Hawaiian
monthly arts and music showcase at
The ARTS at Marks Garage*
Hawai'i Theatre Center, *Hawai'i Theatre
presents Hāna Hou! Season 2014/15*
Hi'ilei Aloha LLC, *Poi Mobile*
Hula Preservation Society, *Led By Our
Elders*
Kōkua Kalihi Valley Comprehensive
Family Services, *Ka Māmaka Kahu*
Kumu Kahua Theatre, *Hawaiian Culture
and Place-Based Theatre*
Wai'anae Hawaiian Civic Club, *E Ala
Voyaging Canoe Education Program*
Waikiki Improvement Association,
Kūhiō Beach Hula & Torch Lighting

Maui

Kaho'olawe Island Preserve, *Hale Ho'oulu
Meakanu and Kalamalama: Building
Bridges Between Kaho'olawe and Kihei*
KHM International, *Moloka'i Mo'olelo*
Kualapu'u Public Conversion Charter
School, *Project Kukui Ehu*

Kaua'i

County of Kaua'i, Office of Economic
Development, *Ke Kaiulu O Anahola,
Project Holowai*

Hawai'i Island

Hawai'i Forest Institute, *Ka Pilina Poina
'Ole "Connection Not Forgotten"*
Kahilu Theatre Foundation, *Kahilu
Theatre's 2014 Hawaiian Film Series*
Kailapa Community Association, *Kailapa
Wellness Park*
Nā Kama Kai, *Nā Kama Kai's Ocean Keiki
Clinics*

Statewide

Bishop Museum, *Traditions of the Pacific
Program*
Makauila, Inc., *Project KULEANA*
Pacific Islanders in Communications,
Hawaiian Media Makers Series
WCIT Foundation, *Hawaiian Architecture
Children's Literature Series*

Native Hawaiian Festivals Program

Hawai'i Maoli,
Prince Kūhiō Celebration
Merrie Monarch Hula Festival
King Kamehameha Celebration
Commission,

King Kamehameha Celebration (O'ahu)
*Na Kamehameha Commemoration
Parade (Maui)*
*King Kamehameha Day Celebration
Parade
(Kona, Hawai'i Island)*
*Kamehameha Festivals
(Hilo, Hawai'i Island)*
Moanalua Garden Foundation,
Prince Lot Hula Festival
Aloha Festivals,
Aloha Kaua'i Festival (Kaua'i)
*Festivals of Aloha, Maui Nui Style
(Maui)*
*Festivals: 30 Days of Aloha
(Hawai'i Island)*

Natural Resources

O'ahu

Ko'olau Mountains Watershed Partner-
ship, *Getting to Know the Ko'olau's
Community Conservation Project*
Sustainable Coastlines Hawai'i,
*Inspiring Coastal Stewardship through
Coastal Cleanups and Community
Outreach*
Invasive Pest Species Early Detection
and Rapid Response on O'ahu
Hawai'i Alliance for Community-Based
Economic Development, *Ka Uhane O
Hālawā*
The Nature Conservancy, *Kāne'ohe Bay
Reef Restoration Project*
Mālama Loko Ea Foundation, *Loko Ea
Restoration Project and Ecotourism
Initiative*
Mālama Nā Honu, *Mālama Nā Hōkū
Volunteer Support Project*

Maui

Hāna Retreat, *Conversations on Water*
Hawai'i Wildlife Fund, *Ho'okuleana:
Ho'okipa Honu: A Research, Education,
and Sea Turtle Protection Project*
Kaho'olawe Island Reserve
Commission, *Kumeheu*
Maui Invasive Species Committee, *The
Maui Soundscape: Keeping it Quiet*
Auwahi, *Supporting Eco-volunteerism at
Auwahi Forest Restoration Project*
Sustainable Coastlines Hawai'i,
*Inspiring Coastal Stewardship through
Coastal Cleanups and Community
Outreach*

Kaua'i

Auwahi, *Expanding Tourism
Opportunities at Makauwahi Cave
Reserve*

Sustainable Coastlines Hawai'i,
*Inspiring Coastal Stewardship through
Coastal Cleanups and Community
Outreach*
Hui O Laka – Kōke'e Natural History
Museum, *"The New CCC," Linking Past
and Present to save Forests for the
Future*
Kōke'e Resource Conservation
Program, *Nurturing Hawai'i's
Biodiversity on Kaua'i*

Hawai'i Island

Big Island Invasive Species Committee,
*BIISC-Healing the Island: Awakening
the people*
Waikoloa Dry Forest, *Ho'ola Hou!
Working together to reforest Waikoloa*
Kailapa Community Association, *KCA
Ungulate and Erosion Mitigation*
The Kohala Center, Inc., *Kohala
Watershed Partnership's Koai'a
Corridor Project*
Coral Reef Alliance, *Leveraging
Economic Incentives to Reduce Coastal
Pollution and Promote Coral Reef
Health in West Hawai'i*
Ho'omalua Ka'ū, *Manuka Land Protection
Project*
Mālama Kohala Kahakai, *Natural
Resource Stewardship and Restoration
of the North Kohala Coast*

Statewide

Hawai'i Forest Institute, *"Give Back to
the Forest" Restoration and Education
Program*
Maui Invasive Species Committee, *Stop
the Spread: Improving Inter-Island
Biosecurity*

Other Hawaiian Culture projects:

Polynesian Voyaging Society, *Hōkūle'a:
Hawai'i Ambassador Project*
Friends of 'Iolani Palace, *Nights at the
Museum's Events*

Natural Resources Advisory Group

Mark Fox,
The Nature Conservancy of Hawai'i
Annette Ka'ohelaui'i,
Hawai'i Ecotourism Association
Vincent Shigekuni,
PBR Hawai'i
T. 'Aulani Wilhelm,
*Papahānaumokuākea Marine National
Monument*

Hawaiian Cultural Program Advisory Council

Nā'ālehu Anthony,
Palikū Documentary Films
Kainoa Daines,
O'ahu Visitors Bureau
Leona Mapuana Kalima,
Hawaiian Cultural Consultant
Cheryl L. Ka'uhane-Lupenui,
Board of Education
Debbie Nakanelua-Richards,
Hawaiian Airlines

Community Product Enrichment

O'ahu

12th Annual Waikiki Spam Jam
13th Annual Korean Festival
2014 Biggest Little Airshow
2014 Chinese New Year Festival
2014 Hawai'i Dragon Boat Festival Competition
2014 Hawai'i Night in Chinatown Festival and Parade
2014 Hawai'i State Farm Fair
21st Annual Filipino Fiesta and Parade
32nd Annual Hawaiian Slack Key Guitar Festival
33rd Annual Hawaiian Scottish Festival & Highland Games
44th Annual 'Ukulele Festival
65th Narcissus Festival
7th Annual Gabby Pahinui Waimānalo Kanikapila
A Celebration of Hawai'i Culture through Music: Concerts and Festivals
Duke Kahanamoku Challenge
Duke's Ocean Fest
Emphasizing Native Hawaiian Culture to First Friday Honolulu
Hawai'i Book and Music Festival
Honolulu Rainbow Film Festival
Ke Ala O Ka Hua Mele
Lei Day Celebration
Multicultural Matsuri
National Guitars Exhibition and Evening Concert at the Bishop Museum
POW WOW Hawai'i - Our Town
Sharing the Plantation Experience
Windward Ho'olaule'a 2014

Maui

14th Maui Matsuri
15th Maui Chinese New Year Festival
2014 Ku Mai Ka Hula
2014 Maui 'Ukulele Festival
23rd Hawaiian Slack Key Guitar Festival
44th Maui Marathon
6th Maui Hawaiian Steel Guitar Festival
Hawaiian Music Series

Hi'iakaikano'iau & Mōhala Hou Ke Kapa: Kapa Blossoms Anew
HILT EcoTourism Project on Maui
Hui No'eau Cultural Arts Program
Jazz Maui
Ka'anapali Fresh
Lahaina Plantation Days
Maui Classical Music Festival
Maui Open Studios
Maui Pops Orchestra 2014
Moloka'i 2 O'ahu Paddleboard World Championships
Pailolo Challenge - Maui to Molokai Canoe Race
Theater on the Isle
Three Chinese Festivals
Wailuku First Friday
World Whale Day

Kaua'i

10th Annual Inspiration Kaua'i Wellness Expo
15th Annual Kōloa Plantation Days Rodeo
1st Saturday in Old Kapa'a Town
2014 Hawaiian Cultural Events & Kaua'i Mokihana Festival
2014 Kaua'i Pow Wow
2014 Orchid and Art Festival
2014 Waimea Town Celebration: Heritage of Aloha
22nd Annual Hawaiian Slack Key Guitar Festival "Kaua'i Style"
7th Annual Red Clay Jazz Festival
Aloha Festival of Culture
Concert in the Garden
Concert in the Sky
E Kanikapila Kakou 2014
Festival of Lights
Heiva I Kaua'i 2014
Ka Moku O Mānokalanipo Makahiki
May Day Lei Contest & Keiki Lā Lei Contest
Nā Lima Hana Festival
Prince Kūhiō Celebration of the Arts
Soto Zen Bon Festival
The 25th Annual Banana Poka Round Up
The Coconut Festival presented by the Kapa'a Business Association
The Kaua'i Music Festival Songwriter Conference

Hawai'i Island

2014 Active Lifestyles, Cultural & Special Events in Historic Kailua Village
Big Island Film Festival at The Fairmont Orchid, Hawai'i
Greenwell Garden Hawaiian Plant Walks with Audio Tours
Growing Agricultural Tourism in North Kohala

Hawai'i Island Hiking and Biking Mobile Application
Hawai'i Volcanoes Institute: Inspirational Experiences in the Great Outdoors
Hawai'i Yoga Festival
HawaiiCon
Hilo Orchid Society 62nd Annual Orchid Show and Sale
Honoka'a Western Week
Hula Arts at Kilauea in Hawai'i Volcanoes National Park
Ka'u Coffee Festival
Kona Earth & Ocean Festival
Mealani A Taste of the Hawaiian Range & Agricultural Festival
Pana'ewa Stampede Rodeo
Puna Music Festival
Queen Lili'uokalani Long Distance Races
Second Half 33rd and First Half 34th Presenting Season

HTA Product Development

Mele Mei & Nā Hōkū Music Festival
May Day
Mahina Mele

HTA Signature Events

Kona Coffee Cultural Festival, Hawai'i Island
Koloa Plantation Days, Kaua'i
Maui Film Festival at Wailea, Maui
Pan Pacific Festival, O'ahu
Honolulu Festival, O'ahu
Hawai'i Food and Wine Festival, O'ahu
Hawai'i International Film Festival, O'ahu
Diamond Head Classic
Hilton Honors Beach Volleyball Challenge
Hyundai Tournament of Champions
Ironman World Championship
LPGA Lotte Championship
Mitsubishi Electric Championship at Hualālai
Pacific Links Hawai'i Championship Pro Bowl
Hawai'i Bowl
Sony Open in Hawai'i
Xterra World Championship
Xterra Trail Run World Championship
EA Sports Maui Invitational
Kaua'i Marathon
Queen Lili'uokalani Canoe Race
'Ohana Cup

Greeting

Kāhea Program

Contracts

Contracts Over \$1 Million Over the Life of the Contract Contractor, Program

a.link LLC, External destination marketing services for Japan

AEG Management, HCC LLC, Management and Marketing of the Hawai'i Convention Center

AVIAREPS Marketing Garden (Holdings) Ltd., External Destination Marketing Services for Other Asia

Brand USA, Brand USA Fall Co-op

City and County of Honolulu, Product Enrichment Program for the City and County of Honolulu

County of Hawai'i, Product Enrichment Program for the County of Hawai'i

County of Kaua'i, Product Enrichment Program for the County of Kaua'i

County of Maui, Product Enrichment Program for the County of Maui

ESPN Regional Television, Inc., Sheraton Hawai'i Bowl and the Diamond Head Classic

ESPN Regional Television, Inc., Hawaiian Island Invitational

Hawai'i Community Foundation, Management of the HTA's Kūkulu Ola: Living Hawaiian Culture and Natural Resource Programs

Hawai'i Visitors and Convention Bureau, External Destination Marketing Management Services for the United States and Canada

Hawai'i Visitors and Convention Bureau, Management of Intellectual Property

Hawai'i Visitors and Convention Bureau, North America Meetings, Conventions, and Incentive Market

Hawai'i Visitors and Convention Bureau, Marketing Activities by the Hawai'i Visitors and Convention Bureau and its Island Chapters

Japan Airlines International, Co., Ltd., Exciting Aloha Program, the Jaloalo Card Program, and the Resortful! Program

Milici Valenti Ng Pack, Inc., Management of all HTA-owned and operated websites

National Football League, 2014 Pro Bowl

PGA Tour, Inc., Corporate Licensing Agreement

The Walshe Group PTY Ltd., External Destination Marketing Services for Oceania

Contracts Over \$100,000 for Calendar Year 2014 Contractor, Program

AEG Management; HCC LLC, Management and Marketing of the Hawai'i Convention Center

Aloha Week Hawai'i, Inc., dba Aloha Festivals, 2014 Aloha Festivals of O'ahu event

Brand USA, Brand USA Fall Co-op

Department of Transportation, Statewide Airport Greetings Program

Hawai'i Academy of Recording Arts, Mele Mei 2014 event and the Na Hoku Hanohano Music Festival*

Hawai'i Ag and Culinary Alliance, dba Hawai'i Food and Wine Festival, Hawai'i Food and Wine Festival

Hawaiian Airlines, Inc., Hawai'i Traveler Acquisition Campaign

Honolulu Festival Foundation, Honolulu Festival event

JWI Marketing Co., Ltd., Marketing management services for Taiwan

Kintetsu International Express (USA), Inc., Pan Pacific Festival

Lotte Championship, 2014 Lotte LPGA Championship Tournament

Maui Economic Development Board, Inc., 2014 Maui Film Festival at Wailea*

McNeil Wilson Communications, Public relations and communications services for Meet Hawai'i

Native Hawaiian Hospitality Association, Hawaiian Culture Initiative of the Tourism Strategic Plan

OmniTrak Group, Inc., Departure Visitor Surveys

Polynesian Voyaging Society,"Hokule'a: Hawai'i's Ambassador" project

Stryker Weiner & Yokota Public Relations, Inc., Public relations and communications services for HTA

The Kalaimoku Group, Hawaiian Music Concert Series and May Day Event

The Mariner Group, LLC, Maritime Vessel Schedule

Travel Link Marketing Co., Ltd., Marketing Management Services for China

VASH Hawai'i Island, Hawai'i County Visitor Assistance Program

Visitor Aloha Society of Hawai'i, Visitor Assistance Program for O'ahu

WCIT Architecture, Inc., Center for Hawaiian Music and Dance

World Triathlon Corporation, 2014 Ironman World Championships

* Contracts that were awarded and ended in calendar year 2014

Communications & Outreach

HTA News Releases

- 14-1 HTA Releases Request for Proposals to Organize and Promote the New Hawaiian Music Concert Series & May Day Event
- 14-2 HTA Selects 2014 Product Enrichment Program (PEP) Events and Organizations
- 14-3 The NFL and HTA to Honor “Hawai‘i NFL Greats” During 2014 Pro Bowl
- 14-4 Hawai‘i Welcomes First Nonstop Flight from Beijing
- 14-5 HTA Releases Request for Qualifications for Consulting Services for the Center for Hawaiian Music and Dance
- 14-6 Total Visitors to Hawai‘i Reached a Record 8.2 Million in 2013
- 14-07 Total Visitor Expenditures for January 2014 Dropped 4.7 percent to \$1.37 Billion
- 14-08 HTA Announces Selection of a General Sales Agent to Represent Hawai‘i in the Latin America Market
- 14-09 February 2014 Total Visitor Spending Similar to Last Year
- 14-10 HTA Announces Selection of Partner to Manage Hawai‘i Music Concert Series and May Day Event
- 14-11 HTA to Issue RFI for Maritime Vessel Scheduling Software
- 14-12 Total Visitor Spending and Arrivals Declined in March 2014 and in the First Quarter of 2014
- 14-13 HTA Issues RFI for Destination Marketing Management Services for Korea
- 14-14 HTA Issues RFP for Maritime Vessel Scheduling Software
- 14-15 The HTA Launches Its Hawaiian Music Concert Series with a Free Rooftop Concert at Hawai‘i Convention Center
- 14-16 Total Visitor Expenditures Decreased 2.2 Percent in April 2014 and 2.9 Percent in the First Four Months of 2014
- 14-17 HTA Issues RFP for International Social Media Services
- 14-18 King Kamehameha Celebration Kicks off Its 142nd Year of Festivities
- 14-19 HTA Releases Request for Proposal for Tourism Destination Representation Services in Korea
- 14-20 Total Visitor Spending Increased 5.1 Percent in May 2014 and 3 Percent through the First Five Months of 2014
- 14-21 HTA’s 2014 Hawai‘i Tourism Conference to Be Held on Aug 28-29
- 14-22 HTA Releases RFPs for Product Enrichment & Signature Events Programs
- 14-23 HTA Releases Requests for Proposal to Manage Its Mahina Mele: Celebration of Hawaiian Music Program
- 14-24 Visitors Spent \$1.3 Billion in June 2014
- 14-25 HTA Announces Selection of Partner for Maritime Vessel Scheduling System
- 14-26 The 8th Annual ‘Onipa‘a Celebration to Feature the HTA’s ‘Ahamele, Monthly Hawaiian Music Series
- 14-27 Total Visitor Spending Rose 2.6 Percent to \$1.4 Billion in July 2014

- 14-28 The HTA Honors 2014 Tourism Legacy Awards at Hawai‘i Tourism Conference
- 14-29 The HTA Welcomes Three New Members to Its Board of Directors
- 14-30 Tickets Still Available for Arashi Concert
- 14-31 Visitor Spending on Par with August 2013 at \$1.3 Billion
- 14-32 Total Visitor Expenditures Rose 1.4 Percent to \$1.1. Billion in September 2014

HTA Media Statements

- Jan. 30, 2014 December Visitor Statistics Statements by County
- Jan. 30, 2014 December Visitor Statistics Statement: 2013 Another Record Year for Hawai‘i Tourism
- Feb. 27, 2014 January Visitor Statistics Statements by County
- Feb. 27, 2014 January Visitor Statistics Statement: Hawai‘i’s Overall Tourism Economy Starting to Plateau
- Mar. 5, 2014 Regarding Reduction of Service from Taipei
- Mar. 10, 2014 Regarding the Third Anniversary of the March 11, 2011 Japan Natural Disasters
- Mar. 24, 2014 Regarding the Future of the NFL Pro Bowl
- Mar. 27, 2014 February Visitor Statistics Statements by County
- Mar. 27, 2014 February Visitor Statistics: Hawai‘i Market Plateaus
- Apr. 28, 2014 March Visitor Statistics by County
- Apr. 28, 2014 March Visitor Statistics: First Quarter of 2014 Slightly Down for Hawai‘i’s Tourism Economy
- May 19, 2014 Regarding the Turtle Bay Conservation Easement
- May 29, 2014 April Visitor Statistics Statements by County
- May 29, 2014 April Visitor Statistics: Visitor Spending and Arrivals Continue to Soften in 2014
- July 11, 2014 May Visitor Statistics Statements by County
- July 11, 2014 May Visitor Statistics: Expenditures for First Five Months of the Year Up \$175 million
- Aug. 4, 2014 June Visitor Statistics Statements by County
- Aug. 4, 2014 June Visitor Statistics: Visitor Spending in First Half of 2014 Reaches \$7.4 Billion
- Aug. 27, 2014 July Visitor Statistics Statements by County
- Aug. 27, 2014 July Visitor Statistics: 2014 Continues to Pace Ahead of Record-Breaking 2013
- Sept. 29, 2014 August Visitor Statistics Statements by County
- Sept. 29, 2014 August Visitor Statistics: Increased Visitor Arrivals and Spending through August as the HTA Continues to Diversify Market Outreach
- Oct. 28, 2014 September Visitor Statistics Statements by County
- Oct. 28, 2014 September Visitor Statistics: Hawai‘i’s Tourism Economy Continues to Pace Ahead of 2013 Record

*"The world will turn to Hawai'i as they
search for world peace because Hawai'i
has the key... and that key is aloha!"*

~ Auntie Pilahi Pākī



HAWAII TOURISM

AUTHORITY

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